

Carrier Cost Systems

Handbook F-55

October 2012 Transmittal Letter

- **A. Explanation.** To gather information about mail characteristics and the costs of processing, transporting, and delivering the mail, the Postal Service conducts tests that provide data for the following cost systems:
 - 1. City Carrier Cost System (CCCS).
 - 2. Rural Carrier Cost System (RCCS).

This handbook is a policy guide for employees at districts and Post Offices who conduct Carrier Cost Systems tests.

- B. Distribution. Handbook F-55 is available on the Postal Service Intranet.
 - 1. Go to http://blue.usps.gov.
 - 2. Under "Essential Links" in the left-hand column, click PolicyNet.
 - 3. Click HBKs.
- C. Comments. Address comments and questions about this document to:

STATISTICAL PROGRAMS FINANCE US POSTAL SERVICE 475 L'ENFANT PLAZA SW ROOM 4900 WASHINGTON DC 20260-4900

D. Effective Date. This handbook is effective immediately.

Joseph Corbett Chief Financial Officer and Executive Vice President

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1 Introduction

In order to set appropriate rates, the United States Postal Service develops cost information for each class of mail, price category, and type of service. The Postal Service uses cost information to develop proposals for new postal rates, to assist in the preparation of budgets, and to conduct management studies. The portion of the total cost attributed to each class and subclass of mail and extra service is determined using these data.

The Postal Service must report annual cost, revenue, volume, and quality of service to the Postal Regulatory Commission (PRC), which sets the appropriate rates. The Postal Service must also ensure that market-dominant products do not subsidize competitive products and that each competitive product covers its attributable costs. Prices for competitive products must be high enough to ensure that revenue exceeds costs. To assist in meeting this requirement, the Postal Service continually collects revenue, volume, weight, and cost information.

To gather information about mail characteristics and the costs of processing, transporting, and delivering the mail, the Postal Service conducts tests that provide data for the following cost systems:

- a. City Carrier Cost System (CCCS).
- b. Rural Carrier Cost System (RCCS).
- c. In-Office Cost System (IOCS).
- d. Transportation Cost System (TRACS).

This chapter introduces the carrier cost system tests. The remaining chapters describe the policies for performing the tests.

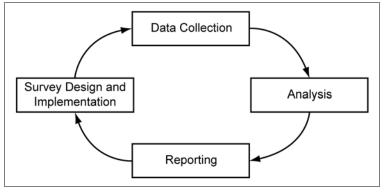
For information on the IOCS test, see Handbook F-45, *In-Office Cost System.* For information on the TRACS test, see Handbook F-65, *Transportation Cost Systems*.

11 Understanding Cost Measurement Systems

The primary sampling systems for estimating the cost of processing, delivering, and transporting the mail are CCCS, RCCS, IOCS, and TRACS. The data collected from the systems enable the Postal Service to allocate costs to each mail category, which aids in determining postal rates. That is why consistent, accurate data collection is essential.

The cost measurement process consists of the four phases shown in Exhibit 11. Exhibit 11

Cost Systems Measurement Process



The following paragraphs explain the phases of the cost systems measurement process.

111 Survey Design and Implementation

In the survey design and implementation phase, Headquarters Statistical Programs personnel develop and revise the data-collection methods for the cost systems. They decide how frequently certain tests will be performed, the number of sites tested, the type of information gathered, the procedures for conducting the tests, and when and how data will be collected. In addition, Statistical Programs staff provide training for data collectors.

When designing a test, Statistical Programs uses established statistical methods to ensure the data's reliability. Principles behind these methods include:

- a. Collecting data in either a census or a sample. (A *census* selects every item, while a *sample* selects a smaller group to study.)
- b. Using the same procedure to gather data, no matter who is conducting the test. Questions are asked that will not be interpreted differently by data collectors. This method ensures that different data collectors performing the same test under the same circumstances will get the same data.
- c. Conducting pilot tests to try out the questions and procedures before using them to gather data. These tests find and correct problems in the procedures that would lead to inaccurate or unreliable data.

112 Data Collection

In the data-collection phase trained data collectors record data for the cost systems tests on laptops. Data collectors count and record mail by product, shape, and other characteristics. The data are attributed to various categories of mail and extra services and are sent to the Computerized On-Site Date Entry System (CODES) Web Base Unit for analysis.

Data must be collected consistently regardless of who performs the tests. For this reason, test questions and procedures are written in a manner that helps to ensure that data will be gathered in a way that will not introduce error or bias. Thus, to ensure the data's reliability, data collectors must follow the procedures exactly. They should review the procedures periodically to refresh their memory of the details.

Data collectors should address any issues that need to be clarified to their Statistical Programs (SP) managers. The SP managers report these issues to Statistical Programs specialists at Headquarters, who work to develop solutions. The SP managers then share any revisions with the data collectors.

113 Analysis

In the analysis phase the data are analyzed for accuracy on two levels. On the first level the field manager, specialist, or designee reviews and approves the tests. Once the data are approved by the CODES Web Base Unit, they are grouped with test data from many other locations. On the second level, the data are checked again by Headquarters personnel.

114 Reporting

In the reporting phase the analyzed data are compiled to create reports that are used by the Postal Service and the PRC. The data are made available electronically and are used to develop estimates for costs of processing, delivering, and transporting the mail by product, shape, and other characteristics.

The Postal Accountability and Enhancement Act of 2006 established ratesetting policies and procedures for both noncompetitive (market dominant) and competitive postal products. The Postal Service submits price-change requests to the Postal Service Board of Governors. These requests include an explanation of and justification for the price change, the effective date, and a schedule of the changed rates.

The Board of Governors reviews and helps justify the rate changes before sending the request to the PRC. The commission considers the request, reviews supporting materials, seeks comments from the public, and makes a decision. The PRC may approve, deny, or alter the rate request. The Postal Service is bound by the decision and must put into effect any rate change the PRC approves.

12 Understanding the Carrier Cost Systems

Each Carrier Cost System (CCS) test counts the mail by product, shape, and other characteristics on randomly selected carrier routes. Data from the tests provide volume estimates on carrier routes for various categories of mail. The data are used to determine the portion of total delivery costs attributable to each mail category and each extra service.

Note: The tests are *not* used to set work standards or to measure mail carrier performance.

CCS includes the following tests:

- a. *City Carrier Cost System:* Used to record mail characteristics for city carrier routes. The CCCS Special Purpose Route (SPR) test records mail characteristics for city SPRs (e.g., parcel post routes, relay routes). For information on conducting the CCCS and CCCS-SPR tests, see Chapter <u>2</u>.
- b. *Rural Carrier Cost System:* Used to record mail characteristics for rural routes. For more information on conducting the RCCS test, see Chapter <u>3</u>.

2 City Carrier Cost System

21 Overview

During a CCCS test, the data collector counts and records mail by class, subclass, and shape for a randomly selected city route. The Postal Service uses the data to attribute city carrier costs to various categories of mail and extra services.

Note: The information from this test is *not* used to set work standards or measure carrier performance.

211 **Definitions**

- a. *Pulling down* mail refers to the process of removing mail from the case in preparation for delivery. A carrier may pull down mail more than once a day.
- b. The *final pull-down* is the last time a carrier pulls down mail before leaving for delivery on a given day.
- c. A *direct bundle* is a bundle that is going to one addressee. A direct bundle may be a tray or tub of loose non-identical mailpieces to one addressee. Count each direct bundle as one mailpiece.
- d. *Identical pieces* refers to a large number of mailpieces with the same characteristics.

212 Essential Personnel

The data collector conducts the test with the help of the delivery supervisor, carrier, and postmaster.

212.1 Data Collector

The data collector must contact the supervisor and carrier at least one day before the test to obtain the information needed to complete it. A sample letter to inform the postmaster of a CCCS test is shown in Exhibit 212.1.

- a. Contact the carrier before the carrier's final pull-down on the day before the test.
- b. Explain the test to essential personnel.
- c. Verify the administrative information for the selected route and adjust for changes made after the sample selection file was created.
- d. Locate the mail to be tested.
- e. Determine the random start number and skip interval.

- f. Select mailpieces and record counts under the proper class, subclass, and shape.
- g. Complete Section 1 of PS Form 2846, *City Carrier Route Mail Acceptance Data.* (A copy of this form and instructions for completing it are in <u>26</u>.)
 - (1) Review the instructions with the postmaster or designee, explain how to count and record mail on this form, and identify sections the postmaster must complete.
 - (2) Tell the postmaster to mail or fax the form to the data collector at the address or fax number specified in Section 1.
- h. Review PS Form 2846 for completeness and accuracy after the postmaster returns it.

UNITED STATES POSTAL SERVICE 315 DISTRICT RD ANY DISTRICT, ST 99999–9998

DATE:December 1, 2012OUR REF:Sample Letter to Inform Test Site of Test ScheduleSUBJECT:City Carrier Cost System (CCCS), Quarter (1, 2, 3, 4 as appropriate)

TO: POSTMASTER JONES US POSTAL SERVICE 119 W 4th ST APPLETON CITY MO 64724-9998

I have attached a schedule of City Carrier route tests to be taken at your office during Quarter ____.

A data collector from the Statistical Programs Unit will contact you one or two days before each scheduled test to determine the time when the carrier for the route to be tested will arrive in the office. On the test date, the data collector will arrive about one hour before the carrier.

The test should not delay the carrier. The carrier unions are aware of these tests and the carrier assistance that is needed. The CCCS test is used only to classify mail delivered by carriers.

This not a test of the carrier; the test is designed to aid in the distribution of costs.

Please inform the carrier of the route selected for a test. Your cooperation and assistance are appreciated.

John Doe Manager, Finance

Attachment

212.2 Postmaster

The postmaster must do the following:

- a. Ensure that Sections 2 and 3 of PS Form 2846 are completed. Count (or designate someone to count) the mail collected by the carrier, and record the amounts in Section 3.
- b. Mail or fax the form to the address or fax number in Section 1.

212.3 **Carrier**

The carrier must:

- a. Help identify mail to be sampled.
- b. Isolate collected mail to be counted by the postmaster or designee.

212.4 Supervisor

The supervisor must:

- a. Determine whether the carrier is to receive overtime pay or auxiliary help because of the test.
- b. Help identify mail to be sampled.
- c. Confirm the finance number, Cost Ascertainment Group (CAG), and route number.
- d. Confirm administrative information for the route being tested.
- e. Fill out the postmaster's sections of PS Form 2846 if he or she is not available.

213 Required Materials

The data collector must take the following materials to the test site:

- a. CODES laptop computer with fully charged battery pack.
- b. AC power pack with power cord.
- c. Extension cord with three-prong safety.
- d. Electronic scale with cable for power source and cable for computer connections.

Note: The scale must be accurate to one-tenth of an ounce. To ensure accuracy, check the balance and level the scale before each test.

- e. Barcode scanner.
- f. Reference Guide City Carrier Cost System (RG-CCCS).
- g. Handbook F-55, Chapter 2, City Carrier Cost System.
- h. Statistical Programs policy letters.
- i. Paper and pen or pencil.
- j. Statistical Programs mail gauge or tape measure.
- k. If the sample file is not on the laptop, a storage device (i.e., USB portable drive) with the sample file.
- I. Data-storage device (i.e., USB portable drive).
- m. PS Form 2846.

214 **Procedures**

This section summarizes tasks the data collector performs when conducting a CCCS test. The subchapters that follow describe the tasks in detail.

a. Preparing for the test:

- (1) Preparing before the day of the test.
- (2) Completing and verifying the Test Header.
- (3) Communication on the day of the test.

b. Identifying and selecting mail to be sampled:

- (1) Mail included in the test.
- (2) Mail excluded from the test.
- (3) Examples of included and excluded mail.
- (4) Selecting the skip interval.
- (5) Selecting the mailpieces.

c. Recording selected mail:

- (1) Mail class and subclass.
- (2) Shape.
- (3) Counting mailpieces.

d. Finalizing the test:

- (1) Reviewing the data and administrative information.
- (2) Determining the time required to complete the test.
- (3) Completing PS Form 2846.

e. CCCS Special Purpose Route (SPR) sampling procedures:

- (1) Overview.
- (2) Sampling units.
- (3) Procedures for testing an SPR.
- f. Completing PS Form 2846.

22 Preparing for the Test

Careful preparation is necessary to ensure that the data collector conducts the test efficiently and that the results are accurate.

221 Preparing Before the Day of the Test

Before the day of the test, the data collector must:

- a. Review current CCCS procedures, including this chapter, the RG-CCCS, and Statistical Programs policy letters.
- b. Call the Post Office[™].

It is extremely important to contact the carrier before he or she begins the final pull-down of mail on the day before the test to ensure that all afternoon (P.M.) mail is available for testing.

- (1) Contact the postmaster or carrier supervisor, and
 - (a) Inform the supervisor that a particular route is scheduled for a CCCS test.
 - (b) Explain the test if the supervisor is unfamiliar with it. (For guidelines, see <u>223</u>).
 - (c) Tell the supervisor that he or she may have to fill out PS Form 2846 after the carrier returns from delivering mail.
 - (d) Gather the information needed to complete the CCCS Test Header Screen.
 - (e) Arrive early enough to set up and begin sampling mail before the carrier arrives. To determine this, ask the supervisor what time the:
 - (i) Office opens.
 - (ii) First clerk arrives.
 - (iii) First truck arrives.
 - (iv) Clerks begin to distribute mail to the routes.
 - (v) Carrier is expected to arrive.
 - (vi) Delivery Point Sequence (DPS) mail arrives.
 - (vii) Carrier is expected to leave.
 - (f) Ask if there are any changes to the route information.
 - (g) Explain the need to obtain End of Run (EOR) data for the following columns on the EOR report. (Ask the supervisor to provide the data promptly.)
 - (i) FIRM.
 - (ii) COA.
 - (iii) NDD.
 - (iv) TMP.
 - (v) WIN.
 - (vi) DPS.
 - (h) Ask whom to contact when you arrive at the facility.

- (2) Contact the carrier before the final pull-down on the day before the test to explain the purpose of the test and use of the data, including:
 - (a) Concept of the test window.
 - (b) Mail included in and excluded from the test.
 - (c) Marking of excluded mail.
 - (d) Handling of P.M. mail.
 - (e) Classifying parcels as regular or deviation.
- (3) Give these pretest instructions to the carrier and the supervisor:
 - Explain what mail is being sampled. (See <u>23</u> for a detailed explanation of the mail to be sampled on the day of the test.)
 - (b) Tell them that mail received after the carrier's final pulldown on the day before the test should not be cased.
 - (c) Tell them that mail not able to be delivered the day before the test should be marked with the date it was available for delivery.
 - (i) If mail is available for delivery before pull-down on the day before the test and is not delivered, tell them to mark it for exclusion from the test.
 - (ii) Explain that the test involves sampling only mail distributed to the route during the test-day window.
 - (d) If there are firm holdouts on the sampled route, ask where that mail is located.
 - (e) If P.M. mail must be cased before the data collector arrives:
 - (i) Ask someone in the office to select sample pieces of P.M. mail for the data collector to record.
 - Provide the random start number and skip interval, and explain how use these to select mailpieces. (See <u>234</u> for instructions on how to determine the random start number and skip interval.)
- c. Ensure that all needed materials are available. (See <u>213</u> for the list of materials.)

222 Completing and Verifying the Test Header

Enter administrative data on the Test Header screen on the day of the test. (For more information, see the RG-CCCS.)

223 Communication on the Day of the Test

To avoid delaying the carrier, the data collector must locate the mail being sampled, begin sampling before the carrier arrives, and as participants arrive, explain what each must do.

- a. Upon arrival, the data collector will meet with the delivery supervisor or the person in charge, and
 - (1) Explain the reason for the visit.

- (2) Explain the purpose of the test and address any concerns.
- (3) Explain the supervisor's role and answer any questions.
- (4) Ask the supervisor to:
 - (a) Point out the carrier's case.
 - (b) Provide the data collector with a DPS EOR printout.
 - (c) Determine if a saturation mailing will be cased.
 - (d) Fill out the postmaster's sections of PS Form 2846 if the postmaster is not available.
- b. When the carrier arrives, the data collector will:
 - (1) Explain that:
 - (a) The test is *not* used to measure carrier performance or set work standards.
 - (b) The test helps the Postal Service allocate the cost of delivering different categories of mail.
 - (c) The carrier's departure will not be delayed, if possible.
 - (2) Ask the carrier to:
 - (a) Identify where mail for the route is located.
 - (b) Verify route information.
 - (c) Identify parcels for the route and classify them as regular or deviation.
 - (d) Give the postmaster or designee the collection mail to count and record on PS Form 2846.
 - (3) Explain that the carrier must separate collection mail into three tubs:
 - (a) Mail collected from online requests for Package Pickup.
 - (b) Mail collected from blue collection boxes.
 - (c) Customer outgoing mail, missorted mail, and mail brought back to the office.
- c. The data collector meets with the postmaster to:
 - (1) Explain the test and the role of each participant.
 - (2) Explain that the data collector completes Section 1 of PS Form 2846, and that the postmaster or designee is responsible for completing (or designating someone to complete) Sections 2 and 3 after the carrier returns from delivering mail. The data collector also:
 - (a) Highlights each section to be completed by the postmaster or designee.
 - (b) Explains what mail must be counted.
 - (c) Explains that PS Form 2846 must be returned to the data collector upon completion. (An example of this form and instructions for completing it are included in <u>26</u>.)

23 Identifying and Selecting Mail to be Sampled

Sample all mail distributed to the route between the start of the final pull-down on the previous delivery day and the start of the final pull-down on the day of the test. Include all of this mail whether or not it is delivered on the test day.

A carrier may pull down mail more than once a day. The final pull-down is the last time the carrier pulls down mail before leaving for delivery.

Exception: In some instances, there is no pull-down on the test day — for example, when all businesses on a route are closed. In this case, the pull-down time should be simulated, and the test window will end at the simulated pull-down time. (For examples of simulated pull-down times, see the RG-CCCS.)

Mail may be distributed to the carrier at times other than when dispatches arrive. Because of differing arrival times, some mail in the sample may not be available when the data collector starts the test. The data collector must:

- a. Sample mail as it becomes available.
- b. Work with office personnel to identify all mail in the sample.
- c. Sample the mail before it is cased, if possible.

231 Mail Included in the Test

The following types of mail are included:

- a. All mail distributed to the route after the carrier began final pull-down the previous delivery day (even if it will be curtailed or held for later delivery), including:
 - (1) Bulk business mail distributed to the route on the test day, even if held for delivery on another day.
 - (2) Afternoon (P.M.) dispatch mail from the previous day, even if it has been cased.
- b. Any mail not brought to the case that was distributed to the route after the carrier began the final pull-down the previous delivery day. This includes parcels, DPS, drop-shipped (which the carrier may pick up on the way to the street), accountable, postage-due, and hot-case mail.
- c. Misthrown mail for this route that other carriers bring to the case.
- d. Any mail for the tested route that is handed off or pivoted to other routes.

Office personnel must verify that each tray, tub, and carrier-route bundle is for the selected route.

232 Mail Excluded From the Test

The following types of mail are excluded:

- a. Vacation holds from previous days.
- b. Parcels, accountable mail, and postage-due items that the carrier has made previous attempts to deliver.
- c. Mail distributed to the case before the carrier started the final pulldown on the previous delivery day.

- d. Bulk business mail distributed to the route on previous delivery days and held for later delivery.
- e. Pallet mail not been broken down and distributed to the carrier route.
- f. Parcels made available to the carrier that are not for the route being tested.
- g. Any mail from other routes that is handed off or pivoted to the tested route.

Examples of Mail to be Included or Excluded

The following examples help illustrate when mail should be included in or excluded from a test.

Example 1: Carrier-route bundles of Standard Mail are distributed to the carrier's case on Tuesday for delivery on Wednesday. If the bundles are distributed to the case before the carrier begins the final pull-down of Tuesday's mail, they should be included in a Tuesday test but tagged and excluded from a Wednesday test, even though they will not be delivered until Wednesday. If they are distributed after the carrier starts the final pull-down of Tuesday's mail, they should be excluded from a Tuesday test and included on a Wednesday test.

Example 2: A pallet of carrier-route presort flats arrives at the station on Wednesday afternoon, with delivery requested for Saturday. Late Thursday afternoon after the carrier has pulled down, the pallet is broken down and bundles of flats are distributed to each route. The bundles are held back on Friday and delivered on Saturday as requested. Exclude these flats from a Wednesday or Thursday test because they were not distributed to the route until after the carrier's final pull-down. Include these flats in a Friday test even though they will be held back. For a Saturday test, tag and exclude these flats because they were previously tested.

Example 3: On Wednesday morning, DPS mail is staged on the dock or in the vestibule. The mail is for delivery on Wednesday, and the test is on Wednesday; so include this mail in the test.

234 Selecting the Skip Interval

Determine the skip interval by the type of mail or mail stream and the time available for sampling the mail. More than one skip interval may be used in a test. Keep mail selected using one skip interval separate from mail selected using other skip intervals.

The six skip intervals are:

- a. Skip interval of 1: Used for accountable mail (including Express Mail, postage-due items, and Registered Mail), direct bundles, identical pieces, a normal parcel workload, and when time allows for recording all mail.
- b. *Skip interval of 3:* Used for a route with a heavy parcel workload and when a skip interval of 1 would detain the carrier considerably.
- c. *Skip interval of 5:* Used for normal sampling of mail when there is time to sample more mail.

- d. *Skip interval of 10:* The most commonly used for sampling. When there is so little mail that using a skip of 10 results in selecting only a few pieces, use a lower skip interval.
- e. *Skip interval of 20:* Used to sample routes with high mail volumes or short time windows for sampling.
- f. *Skip interval of 40:* Used to sample routes with extremely high mail volumes or very short time windows for sampling.

If a parcel or accountable mailpiece is discovered when sampling mail using a skip interval greater than 1, include it in the count; if selected, record the mailpiece appropriately.

Example: When counting through a letter tray using a skip interval of 10, a First-Class Certified letter is selected. Record this mailpiece as any other selected from the tray.

235 Selecting the Mailpieces

The CODES software provides the random start number for the data collector, who will perform the following tasks:

a. Selecting mailpieces:

- Count the pieces sequentially until the start number is reached. Set that piece aside for recording. Thereafter, select every *x* piece where *x* is the mailpiece skip interval.
- (2) Keep track of the number of pieces remaining after the last piece is selected from a tray, tub, or bundle of mail by writing the number on the Test Schedule or Header Sheet, which can be printed from the CODES Web Base Unit.
- (3) Use this number and continue counting the mailpieces in the next tray, tub, or bundle.

Example 1: If the CODES laptop displays a start number of 6, record the 6th piece of mail. If the skip interval is 10, select and set aside for recording the 6th mailpiece, the 16th, the 26th, and so on.

Example 2: After you select the last sample in the tray, 3 pieces remain. Count the first mailpiece in the next tray as No. 4 and continue counting until you reach the skip interval. If the skip interval is 10, select the 7th piece in the tray.

b. Handling DPS mail:

- (1) Keep selected pieces of DPS mail separate from the other selected mailpieces.
- (2) Unless the carrier agrees otherwise, keep DPS mail in its original order.
- (3) Select the sample mailpieces according to the random start number and skip interval. (The data collector may want to mark the place of each selected mailpiece in the tray by turning the mailpiece that follows it on end.)
- (4) Record the selected mailpieces individually.
- (5) Return each mailpiece to its place in the tray before recording the next one.

c. Exceptions:

- (1) Sample any mail that has been cased before you arrive. Use the skip interval as explained in <u>234</u>. If the carrier is still casing mail, sample the mail in the case first, then sample the uncased mail. After you finish sampling cased mail, the carrier may case any mailpieces that have been sampled and recorded.
- (2) If mail delivered to the carrier's case before final pull-down on the day before the test day is not marked for exclusion and is commingled with mail delivered to the carrier's case on the test day, reschedule the test.

24 Recording Selected Mail

For the pieces selected, determine and record class, subclass, shape, piece count, and other characteristics.

241 Mail Class and Subclass

Mail class is determined by the weight and content of the mailpiece and by the service provided. See the RG-CCCS for a detailed explanation.

Note: For direct bundles, record the class and subclass of the top piece of mail. Each direct bundle is counted as one piece.

242 Shape

Shape is determined based on mail specifications *in Mailing Standards of the United States Postal Service,* Domestic Mail Manual (DMM[®]). For more information on recording shape, see the RG-CCCS.

243 Counting Mailpieces

When counting selected mailpieces:

- a. Group and count together nonaccountable letter and flat mail with the same skip interval and characteristics.
- b. Record parcels and accountable mailpieces individually.
- c. Don't record parcel-shaped mailpieces such as Enhanced Carrier Route Walking Sequence Saturation (ECRWSS) parcels or Bound Printed Matter phone books when:
 - (1) The parcels are identical and destined for multiple deliveries on a tested route.
 - (2) Recording additional information would significantly delay the carrier.
- After entering the count, flag unlikely combinations of mailpiece characteristics in CODES.
- e. Verify that the characteristics (including class, subclass, and shape) and the count were entered correctly. For unlikely combinations, enter a comment that describes the unlikely combination and count.

25 Finalizing the Test

251 Reviewing the Data and Administrative Information

- a. After entering all mail counts, review the data. If you find errors, return to data entry and correct them.
- b. For rare or unlikely mail categories, CODES displays warning screens asking the data collector to verify the entries. Add comments on these mailpieces to verify or explain unusual characteristics.
- c. Before completing or suspending the test, review all administrative information in the Test Header.

Determining the Time Required to Complete the Test

After reviewing and correcting the data, record the time taken to complete the test, including time spent on the following tasks:

- a. Preparing forms.
- b. Communicating with the postmaster, supervisor, and the carrier on the day of the test.
- c. Setting up the computer.
- d. Selecting the sample and gathering the mailpieces.
- e. Entering mailpiece data into the computer.
- f. Reviewing data and ending the test.
- g. Traveling to and from the test site.

Note: Do not include time spent off the clock, working on another test, or reading.

Example: On the day before the test, it takes 4 hours to get to the test site from the office and check into a hotel. On the test day, it takes 15 minutes to get to the test site from the hotel. It takes 1 hour and 10 minutes to prepare for and conduct the test and another 4 hours and 5 minutes to get back to the office. The total time is 9 hours and 30 minutes.

253 Completing PS Form 2846

The data collector must:

- a. Fill out Section 1 of PS Form 2846, then give it to the postmaster or designee to complete and return.
- b. Tell the postmaster what mail to include in the count and where to enter each mail category.

For detailed instructions on completing PS Form 2846, see <u>26</u>.

253

26 Completing PS Form 2846, *City Carrier Route Mail* Acceptance Data

PS Form 2846 is used to report the volume of mail the carrier collects on the day of the test. The postmaster or designee completes the form. All mail that the carrier brings back is counted, including returned mail and mail that was missorted to the test route.

PS Form 2846 (Exhibit 26) is available on the Postal Service Forms page at http://blue.usps.gov/formmgmt/forms/ps2846.pdf.

261 Data Collector – Sections 1, 2, and 3

The data collector must:

- a. Highlight the administrative data to be completed by the postmaster or designee.
- b. Complete Section 1.
- c. Obtain the test ID and city route number from the Test Schedule or Test Header screen.
- d. Give the form to the postmaster or designee, who completes Sections 2 and 3.

Postmaster and Carrier – Sections 2 and 3

- a. The postmaster or designee completes Sections 2 and 3 after the carrier returns from delivering and collecting the mail.
- b. The carrier separates the mail into three tubs:
 - (1) One for online requests for Package Pickup.
 - (2) One for blue collection box mail.
 - (3) One for customer outgoing mail, missorted mail, and mail brought back to the Post Office.
- c. When counting, follow the instructions on the form to determine the class and shape categories.
- d. Use the mail recipient's address to determine if mail is domestic or international.

263 **Postmaster – Section 3**

The data collector must explain to the postmaster or designee how to record collected mail on PS Form 2846.

The postmaster or designee must:

- a. Record franked mail and penalty mail from U.S. government agencies based on the service provided.
- Record balloting materials endorsed "US Postage Paid 39 USC 3406" as First-Class Mail.
- c. Describe the items counted in "Other."

- d. Count Business Reply Mail[™] (BRM) and Netflix and Blockbuster mail on the First-Class Mail row. Count BRM mail as Priority Mail if it weighs more than 13 ounces.
- e. Count Certified Mail at the rate category under which it was sent (First-Class Mail or Priority Mail, depending on the weight of the mailpiece).
- f. Count Postal Service mail and Free Matter for the Blind and Handicapped mail on the Other row. Explain what kind of mail is counted on the Other row in the space below the Other line.

264 **Postmaster's Responsibility**

The postmaster or designee will mail or fax the form to the data collector whose name and address appear in Section 1.

265 After the Test Is Completed

- a. A Statistical Programs (SP) manager must review the form for completeness and accuracy and discuss any incomplete or inconsistent items with the postmaster or designee.
- b. The SP manager or designee must enter the data on PS Form 2846 into the CODES Web Base Unit and transmit it. For a test that has zero collection volume, he or she must select the appropriate choice in CODES to describe the reason.
- c. Those entering data must bring cross-cell error checks to their manager's attention so that appropriate action can be taken if editing is required.

Exhibit 26 **PS Form 2846, City Carrier Route Mail Acceptance Data (page 1 of 2)**

POSTAL SERVICE ®		City Carrier Rout		-	
Postmaster Instructions The information obtained from this form will be use	d	 Include the following in your count: All mail brought back by the city carrier on the test 			
to distribute mail collection costs to different class		 All mail brought back date. 	k by the city car	ner on the test	
mail for use in setting rates. The data is not used work standards or measure a mail carrier's perform		All mail that was collected.All mail that was not delivered by the carrier.			
You (or your designee) are responsible for collectin recording the required information.	ng and				
 Instruct the carrier to keep separate all collection a undelivered mail on the test day and give the mail or your designee for counting. 					
Section 1 - Completed By Data Collection Technician					
Full Name of Data Collection Technician	Telepho	one Number (Include Area Code)	Facsimile Number		
Address (Number and Street)		City, State, and ZIP + 4 [®]			
		ffice Data		1c. ZIP Code™	
1a. Name of Facility		City and State		IC. ZIP Code	
2. Date Test Taken (MM/DD/YYYY) 3. Test I.D.	4 (City Carrier Route Number			
		ony carrier route runiber			
Section 2 - Completed By Postmaster or Designee (Co	omplete				
Section 2 - Completed By Postmaster or Designee (Co 5. Name of Postmaster or Designee	omplete		hone Number (Inclu	ide Area Code)	
5. Name of Postmaster or Designee		6. Telep		ide Area Code)	
5. Name of Postmaster or Designee Section 3 - Completed By Postmaster or Designee (Co	omplete	6. Telep		de Area Code)	
5. Name of Postmaster or Designee Section 3 - Completed By Postmaster or Designee (Co	omplete	6. Telep Part A and Part B as applic.		ide Area Code)	
5. Name of Postmaster or Designee Section 3 - Completed By Postmaster or Designee (Co Part)	omplete A — Ma n 7.	6. Telep Part A and Part B as applic iling Instructions	able.)		
 5. Name of Postmaster or Designee Section 3 - Completed By Postmaster or Designee (Co Part) Mailing Instructions If there are any remarks you wish to state, use iten Mail or send by facsimile the completed form to the identified in Section 1. 	omplete A — Ma n 7.	6. Telep Part A and Part B as applic iling Instructions	able.)		
 5. Name of Postmaster or Designee Section 3 - Completed By Postmaster or Designee (Co Part) Mailing Instructions If there are any remarks you wish to state, use iten Mail or send by facsimile the completed form to the identified in Section 1. 	omplete A — Ma n 7.	6. Telep Part A and Part B as applic iling Instructions	able.)		
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Handbook F-55

Mail Data Instructions

Test I.D.

Exhibit 26 PS Form 2846, City Carrier Route Mail Acceptance Data (page 2 of 2)

letters, cards and flats, priority parcels). Provide separate coun collection boxes, and mail that came from customer mail recept	its for mail that		th shape of mail m <i>online reques</i>		
	Customer Outgoing Collection (Blue) Box		ue) Box	Carrier Picku (Online)	
Product Description	Letters, Cards, and Flats	Parcels	Letters, Cards, and Flats	Parcels	All Shapes
Domestic Mail (Excluding Return Services)					
 First-Class Mail[®] — metered, stamped, permit [Include Ballot Mat. U.S. Postage Paid 39 USC 3406, Business Reply Mail[®](BRM), Netflix]. 					
2. Priority Mail (Except International)					
3. Periodicals					
4. Express Mail (Except International)					
 Standard Mail[®] [Include missorted Standard Mail, Non- Profit, and Unendorsed Bulk Business Mail (UBBM)] 					
 Package Services (Media Mail, Library Mail, Bound Printed Matter, and Parcel Post, excluding PSRS) 					
DOMESTIC MAIL RETURN SERVICES ONLY					
7. Merchandise Return Service(MRS) — First-Class Mail					
8. Merchandise Return Service — Priority Mail					
9. Merchandise Return Service — Parcel Post					
10. Merchandise Return Service — Bound Printed Matter					
11. Merchandise Return Service — Library and Media					
12. Parcel Select [®] Return Service [Parcel Return Service (PRS)] ¹ Write in destinating ZIP of one PRS piece					
13. First-Class Package Return Service (First-Class Returns)					
14. Priority Mail Return Service (Priority Mail Returns)					
15. Ground Return Service (Ground Returns)					
International Mail — U.S. Origin					
16. Global Express Guaranteed® (GXG)®					
17. Express Mail International [®] (EMS) [®]					
18. Priority Mail International [®] (Flat Rate Envelope)					
19. Priority Mail International (All others including Flat Rate Box)					
20. First-Class Mail International®					
21a. Other (Specify below)					

Part B — Mail Data

Separate into one tub mail collected from online requests for carrier pickup (Express Mail[®], Priority Mail[®], and international mail only).

¹Parcel Select Return Service mail should always have a destinating ZIP that begins with 569.

PS Form 2846, October 2011 (Page 2 of 2)

27 CCCS Special Purpose Route Sampling Procedures

271 **Overview**

Special Purpose Routes (SPRs) are used for miscellaneous carrier activities. City carriers assigned to an SPR clock into the following Management Operating Data Systems (MODS) activities:

- a. Parcel Post (Op 733-734).
- b. Relay (Op 735-736).
- c. Combination (Op 737-738).
- d. Carrier Drivers (Op 739-740).
- e. Express Delivery (Op 767).

Work hours for these city carrier operations contribute to Labor Distribution Code (LDC) 23 costs, and the sampling of an SPR focuses on LDC 23 street operations.

The "Collection Routes" SPR, which contributes to LDC 27 costs, is not sampled in the CCCS-SPR.

Note: Traditional sampling of city letter routes focuses on LDC 22 street operations.

272 Sampling Units

CCCS uses extracts from the Address Management System (AMS) as a sampling frame for letter routes. However, AMS does not identify all SPRs. Because city carriers must indicate a route number when clocking into LDC 23 operations, the sampling frame for testing SPRs is created using clock rings from recent Time and Attendance Collection System (TACS) records. The sampling unit for testing SPRs is the 6-digit TACS route number (for each finance number) for the day of the test. Data collectors will record administrative and mailpiece data for *all* city carriers (sometimes two or more) clocked into the sampled route number (LDC 23 operations only) on the test day.

Note: Although SPRs are identified in the CCCS sample file by the leading *S* in the route number (for example *S199*), the route number in TACS does not have the *S*. Statistical Programs adds the *S* to differentiate between letter routes (beginning with a *C*) and SPRs. When looking at TACS reports, the route number CCCS uses is the last 3 digits of the "Route" field. The second and third digits of the TACS route number usually correspond to the last two digits of the ZIP Code.

3 Rural Carrier Cost System

31 Overview

During an RCCS test, the data collector counts and records mail by class, subclass, compensation category, and shape for a randomly selected rural route. The Postal Service uses the data to attribute rural carrier costs to various categories of mail and extra services.

Note: The information from this test is *not* used to set work standards or measure carrier performance.

311 **Definitions**

- a. *Pulling down* mail refers to the process of removing mail from the case in preparation for delivery. A carrier may pull down mail more than once a day.
- b. The *final pull-down* is the last time a carrier pulls down mail before leaving for delivery on a given day.
- c. A *direct bundle* is a bundle that is going to one addressee. A direct bundle may be a tray or tub of loose non-identical mailpieces to one addressee. Count each direct bundle as one mailpiece.
- d. *Identical pieces* refers to a large number of mailpieces with the same characteristics.

312 Essential Personnel

The data collector conducts the test with the help of the delivery supervisor, carrier, and postmaster.

312.1 Data Collector

The data collector must contact the supervisor and carrier at least one day before the test to obtain the information needed to complete it. A sample letter to inform the postmaster of an RCCS test is shown in <u>Exhibit 312.1</u>.

- a. Contact the carrier before the last pull-down on the day before the test.
- b. Explain the test to essential personnel.
- c. Verify administrative information for the selected route and adjust for changes made after the sample selection file was created.
- d. Locate the mail to be tested.
- e. Determine the random start number and skip interval.

- f. Select mailpieces and record counts under the proper class, subclass, compensation category, and shape.
- g. If the test delays the carrier, complete PS Form 2847, *Rural Carrier Payment Authorization*. Ask the carrier and postmaster to sign the form, and ask the postmaster to mail it. (A copy of this form and instructions for completing it are in <u>37</u>.)
- h. Complete Section 1 of PS Form 2848, *Rural Carrier Route Mail Acceptance Data.* (A copy of this form and instructions for completing it are in <u>38</u>).
 - (1) Review the instructions with the postmaster or designee, explain how to count and record mail on this form, and identify sections the postmaster must complete.
 - (2) Tell the postmaster to mail or fax the form to the data collector at the address or fax number specified in Section A.
- i. Review PS Form 2848 for completeness and accuracy after the postmaster returns it.

UNITED STATES POSTAL SERVICE 315 DISTRICT RD ANY DISTRICT, ST 99999–9998

DATE: December 1, 2012 REF: Sample Letter to Inform Test Site of Test Schedule SUBJECT: Rural Carrier Cost System (RCCS), Quarter (1, 2, 3, 4 as appropriate)

TO: POSTMASTER JONES US POSTAL SERVICE 119 W 4th STREET APPLETON CITY MO 64724-9998

I have attached a schedule of Rural Carrier route tests to be taken at your office during Quarter _____.

A data collector from the Statistical Programs unit will contact you one or two days before each scheduled test to explain the test and clarify the help and information required in order to correctly complete the test. A day or two before the test, the data collector will also speak to the carrier and carrier route supervisor to obtain information about the route, arrival times of the mail and personnel working with the mail. On the test date, the data collector will arrive early to begin sampling the mail prior to the carrier's arrival. The data collector will interfere as little as possible with the work of the carrier.

The data collector may ask the carrier for some minor assistance while conducting the test; for example, identifying mail for the route. The carrier unions are aware of these tests.

The test could delay the carrier. The carrier will be compensated for this delay at the rural carrier's average pay rate. The data collector will ask both the carrier and you to sign a PS Form 2847 to cover any additional time required by the test.

You will be asked to participate in the rural carrier test. When the carrier returns from the route, you will need to record information about the mail collected on the route on the test day. This should require only a few minutes. Please inform the carrier of the route selected for the test.

Your cooperation and assistance are appreciated.

John Doe Manager, Finance

Attachment

312.2 Postmaster

The postmaster must:

- a. Ensure that Sections B and C of PS Form 2848 are completed. Count (or designate someone to count) the mail collected by the carrier, and record the amounts in Section C.
- b. Mail or fax the form to the address or fax number in Section A.
- c. Sign and mail PS Form 2847 if the carrier was delayed by the test.

312.3 **Carrier**

The carrier must:

- a. Help identify mail to be sampled.
- b. Isolate collected mail to be counted by the postmaster or designee.
- c. If delayed by the test, sign PS Form 2847.

312.4 Supervisor

The supervisor must:

- a. Determine whether the carrier will receive overtime pay or auxiliary help because of the test.
- b. Help identify mail to be sampled.
- c. Confirm the finance number, Cost Ascertainment Group (CAG), route number, and route type.
- d. Confirm administrative information for the route being tested.
- e. Fill out the postmaster's sections of PS Form 2848 if he or she is not available.

313 Required Materials

The data collector must have the following materials to conduct the test:

- a. CODES laptop with fully charged battery pack.
- b. AC power pack with power cord.
- c. Extension cord with three-pronged safety.
- d. Electronic scale with cable for power source and cable for computer connection.

Note: The scale must be accurate to one-tenth of an ounce. To ensure accuracy, check the balance and level the scale before each test.

- e. Barcode scanner.
- f. Reference Guide Rural Carrier Cost System (RG-RCCS).
- g. Handbook F-55, Chapter <u>3</u>, Rural Carrier Cost System.
- h. Statistical Programs policy letters.
- i. Paper and pen or pencil.
- j. Rural Mail Count Gauge with 5-inch and 6 1/8-inch measurements.
- k. Statistical Programs mail gauge or tape measure.

- I. If the sample is not on the laptop, a data-storage device (i.e., a USB portable drive) with the sample file.
- m. Data-storage device (i.e., a USB portable drive).
- n. Marking slips to identify test mail.
- o. PS Form 2847.
- p. PS Form 2848.

314 **Procedures**

This section summarizes the tasks the data collector performs when conducting an RCCS test. The subchapters that follow describe the tasks in detail.

a. **Preparing for the test:**

- (1) Preparing before the day of the test.
- (2) Completing and verifying the Test Header.
- (3) Communication on the day of the test.

b. Identifying and selecting mail to be sampled:

- (1) Mail included in the test.
- (2) Mail excluded from the test.
- (3) Examples of included and excluded mail.
- (4) Selecting the skip interval.
- (5) Selecting the mailpieces.

c. Recording selected mail:

- (1) Mail class and subclass.
- (2) Compensation category.
- (3) Shape.
- (4) Counting mailpieces.

d. Finalizing the test:

- (1) Reviewing the data and administrative information.
- (2) Determining the time required to complete the test.
- (3) Completing forms.

e. Conducting the RCCS test by phone:

- (1) Requirements.
- (2) Procedures.
- f. Completing PS Form 2847.
- g. Completing PS Form 2848.

32 Preparing for the Test

Careful preparation is necessary to ensure that the data collector conducts the test efficiently and that the results are accurate.

321 Preparing Before the Day of the Test

Before the day of the test, the data collector must:

- a. Determine if the test will be conducted by telephone. If so, follow the procedures in 36.
- b. Review current RCCS test procedures, including this chapter, the RG-RCCS, and Statistical Programs policy letters.
- c. Call the Post Office™.

It is extremely important to contact the carrier before he or she begins the final pull-down of mail on the day before the test to ensure that all afternoon (P.M.) mail is available for testing.

- (1) Contact the postmaster and carrier supervisor, and
 - (a) Inform the supervisor that a particular route is scheduled for an RCCS test.
 - (b) Explain the test if the supervisor is unfamiliar with it. (For guidelines, see <u>323</u>.)
 - (c) Tell the supervisor that he or she must fill out PS Form 2848 after the carrier returns from the route.
 - (d) Gather the information needed to complete the RCCS Test Header screen.
 - (e) Ask the supervisor to have PS Form 4241-A, *Rural Route Evaluation,* available for the sampled route. (The form is show in Exhibit 321.)
 - (i) Ask if there have been any changes in the route information.
 - (ii) Use the information on the form to complete the RCCS Test Header screen and to record questions for any intermediate office. (See the RG-RCCS for information on completing the Test Header screen.)
 - (f) Determine if the sampled route serves *intermediate offices* (separate rural Post Offices served by a rural carrier).
 - (i) Determine the number of intermediate offices on the route.
 - (ii) Use the CODES software to select either the headout office or an intermediate office for testing.
 - (iii) Determine the portion of the route that will be tested to find out whom to speak with concerning the test.

- (iv) If the intermediate office selected for sampling is under the jurisdiction of another district, notify your manager. The manager will contact the Statistical Programs Service Center to determine the best way to proceed.
- (g) Arrive early enough to set up and begin sampling the mail before the carrier arrives. To determine this, ask the supervisor what time the:
 - (i) Office opens.
 - (ii) First clerk arrives.
 - (iii) First truck arrives.
 - (iv) Clerks begin to distribute mail to the routes.
 - (v) Carrier is expected to arrive.
 - (vi) Delivery Point Sequence (DPS) mail arrives.
 - (vii) Carrier is expected to leave.
- (h) Ask the supervisor if someone can identify the mail for the tested route and help answer questions that may arise in determining how mail will be counted in the Rural Mail Count. Even if a carrier familiar with the route is not available, conduct the test at the scheduled time.
- Explain the need to obtain End of Run (EOR) data for the following columns on the EOR reports. (Ask the supervisor to provide the data promptly.)
 - (i) FIRM.
 - (ii) COA.
 - (iii) NDD.
 - (iv) TMP.
 - (v) WIN.
 - (vi) DPS.
- (j) Ask whom to contact when you arrive at the facility.
- (2) Contact the carrier before the final pull-down on the day before the test to explain the purpose of the test and use of the data, including:
 - (a) Concept of the test window.
 - (b) Mail included in and excluded from the test.
 - (c) Marking of excluded mail.
 - (d) Handling of P.M. mail
 - (e) Counting mail in the Rural Mail Count.
- (3) Give these pretest instructions to the supervisor and the carrier:
 - (a) Explain what mail is being sampled. (See <u>33</u> for a detailed explanation of the mail to be sampled on the day of the test.)
 - (b) Tell them that mail received after the carrier's final pulldown on the day before the test should not be cased.

- (c) Tell them that mail not delivered the day before the test should be marked with the date it was available for delivery.
 - (i) If mail is available for delivery before pull-down on the day before the test and is not delivered, tell them to mark it for exclusion from the test.
 - (ii) Explain that the test involves sampling only mail distributed to the route during the test-day window.
- (d) If there are firm holdouts on the sampled route, ask where that mail is located.
- (e) If P.M. mail must be cased before the data collector arrives:
 - (i) Ask someone in the office to select sample pieces of P.M. mail for the data collector to record.
 - (ii) Provide the random start number and skip interval, and explain how to use them to select mailpieces.
 (See <u>334</u> for instructions on how to determine the random start number and skip interval).
- d. Ensure that all needed materials are available. (See <u>312</u> for a list of materials.)

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Exhibit 321 PS Form 4241-A, Rural Carrier Route Evaluation

322 Completing and Verifying the Test Header

Enter administrative data into the Test Header screen on the day before the test for selected rural routes that have intermediate routes. (For more information, see the RG-RCCS.)

For all other tests, enter administrative data into the Test Header screen at the test site on the morning of the test. Review PS Form 4241-A at the Post Office to verify header information. (The form is shown in <u>Exhibit 321</u>.)

323 Communication on the Day of the Test

To avoid delaying the carrier, the data collector must locate all mail being sampled, begin sampling before the carrier arrives, and as participants arrive, explain what each must do.

- a. Upon arrival, the data collector will meet with the delivery supervisor or the person in charge, and
 - (1) Explain the reason for the visit.
 - (2) Explain the purpose of the test and address any concerns.
 - (3) Explain the supervisor's role and answer any questions.
 - (4) Ask the supervisor to:
 - (a) Provide any additional administrative information about the route.
 - (b) Explain how mail is distributed to the route.
 - (c) Point out the carrier's case.
 - (d) Provide the data collector with the DPS EOR printout.
- b. When the carrier arrives, the data collector will:
 - (1) Explain that:
 - (a) The test is *not* used to measure carrier performance or set work standards.
 - (b) The test helps the Postal Service allocate the cost of delivering different categories of mail.
 - (c) The carrier's departure will not be delayed, if possible.
 - (2) Ask the carrier to:
 - (a) Provide any additional information about the route, including the location of PS Form 4241-A.
 - (b) Explain how mail is distributed to the route.
 - (c) Identify where mail for the route is located.
 - (d) Give the postmaster or designee the collection mail to count and record on PS Form 2848.
 - (3) Explain to the carrier how to handle the collection mail:
 - (a) The carrier should have one tub for mail collected from online requests for Package Pickup and one for all other mail.
 - (b) The carrier should not include mail:
 - (i) Picked up from collection boxes or cluster box unit collection compartments.

- (ii) Taken out but not delivered (for example, markup mail).
- (iii) For sampled intermediate routes.
- c. The data collector meets with the postmaster or whoever is in charge to:
 - (1) Explain the test and the role of each participant.
 - (2) Explain that if the data collector completes PS Form 2847, the postmaster must sign and mail or fax it to the Accounting Service Center address or fax number printed on the form. (An example of this form and instructions for completing it are in 37.)
 - (3) Explain that the data collector completes Section A of PS Form 2848 and that the postmaster or designee fills out Sections B and C after the carrier returns from the route. The data collector also:
 - (a) Highlights each section to be completed by the postmaster or designee.
 - (b) Explains what mail must be counted.
 - (c) Explains that PS Form 2848 must be returned to the data collector upon completion. (An example of this form and instructions for filling it out are in <u>38</u>.)

33 Identifying and Selecting Mail to Be Sampled

Sample all mail distributed to the route between the start of the final pull-down on the previous delivery day and the start of the final pull-down on the day of the test. Include all of this mail whether or not it is delivered on the test day.

A carrier may pull down mail more than once a day. The final pull-down is the last time the carrier pulls down mail before leaving for delivery on a given day.

Mail may be distributed to the carrier at times other than when dispatches arrive. Because of differing arrival times, some mail in the sample may not be available when the data collector starts the test. The data collector must:

- a. Sample mail as it becomes available.
- b. Work with office personnel to identify all mail in the sample.
- c. Sample the mail before it is cased, if possible.

331 Mail Included in the Test

The following types of mail are included:

- All mail distributed to the route after the carrier began the final pulldown the previous delivery day (even if it will be curtailed or held for later delivery), including:
 - (1) Bulk business mail distributed to the route on the test day, even if it is held for delivery on another day.
 - (2) Afternoon (P.M.) dispatch mail from the previous day, even if it has been cased.

- b. Any mail not brought to the case that was distributed to the route after the carrier began the final pull-down the previous delivery day. This includes parcels, DPS, drop-shipped (which the carrier may pick up on the way to the street), accountable, postage-due, and hot-case mail.
- c. Misthrown mail for this route that other carriers bring to the case.
- d. Any mail for the tested route that is handed off or pivoted to other routes.

Office personnel must verify that each tray, tub, and carrier-route bundle is for the selected route.

332 Mail Excluded From the Test

The following types of mail are excluded:

- a. Vacation holds from previous days.
- b. Parcels, accountable mail, and postage-due items that the carrier has made previous attempts to deliver.
- c. Mail distributed to the case before the carrier started the final pulldown on the previous delivery day.
- d. Bulk business mail distributed to the route on previous delivery days and held for later delivery.
- e. Pallet mail not broken down and distributed to the carrier route.

Examples of Included and Excluded Mail

The following examples illustrate when mail should be included in or excluded from a test.

Example 1: Carrier-route bundles of Standard Mail are distributed to the carrier's case on Tuesday for delivery on Wednesday. If the bundles are distributed to the case before the carrier begins the final pull-down of Tuesday's mail, they should be included in a Tuesday test but tagged and excluded from a Wednesday test, even though they will not be delivered until Wednesday. If they are distributed after the carrier starts the final pull-down of Tuesday's mail, they should be excluded from a Tuesday test and included in a Wednesday test.

Example 2: A pallet of carrier-route presort flats arrives at the station on Wednesday afternoon, with delivery requested for Saturday. Late Thursday afternoon after the carrier has pulled down, the pallet is broken down and bundles of flats are distributed to each route. The bundles are held back on Friday and delivered on Saturday as requested. Exclude these flats from a Wednesday or Thursday test because they were not distributed to the route until after the carrier's final pull-down. Include these flats in a Friday test even though they will be held back. For a Saturday test, tag and exclude them because they were previously tested.

Example 3: On Wednesday morning, DPS mail is staged on the dock or in the vestibule. The mail is for delivery on Wednesday, and the test is on Wednesday; so include this mail in the test.

Example 4: The carrier for the tested route picks up mail at another facility for delivery on an intermediate route with a different route number. The intermediate-route mail is delivered in the middle of the test route, so exclude this mail from the test.

Note: Because the data collector is sampling mail before it is cased, commingled pieces of missent or misthrown mail for other routes should be included in the test. In this case it is acceptable to have a potential for double counting because this mail could be tested on more than one route.

334 Selecting the Skip Interval

Determine the skip interval by the type of mail or mail stream and the time available for sampling the mail. More than one skip interval may be used in a test. Keep mail selected using one skip interval separate from mail selected using other skip intervals.

The six skip intervals are:

- a. Skip interval of 1: Used for accountable mail (including Express Mail, postage-due items, and Registered Mail), direct bundles, identical pieces, a normal parcel workload, and when time allows for recording all mail.
- b. *Skip interval of 3:* Used for a route with a heavy parcel workload and when a skip interval of 1 would detain the carrier considerably.
- c. *Skip interval of 5:* Used for normal sampling when there is time to sample more mail.
- d. *Skip interval of 10:* The most commonly used for sampling. When there is so little mail that using a skip interval of 10 results in selecting only a few pieces, use a lower skip interval.
- e. *Skip interval of 20:* Used to sample routes with high mail volumes or short time windows for sampling.
- f. *Skip interval of 40:* Used to sample routes with extremely high mail volumes or very short time windows for sampling.

If a parcel or accountable mailpiece is discovered when sampling mail using a skip interval greater than 1, include it in the count; if selected, record the mailpiece appropriately.

Example: When counting through a letter tray using a skip interval of 10, a First-Class Certified letter is selected. Record this mailpiece as any other selected from the tray.

335 Selecting the Mailpieces

The CODES software provides the random start number for the data collector, who will perform the following tasks:

a. Selecting mailpieces:

- Count the pieces sequentially until the start number is reached. Set that piece aside for recording. Thereafter, select every *x* piece where *x* is the mailpiece skip interval.
- (2) Keep track of the number of pieces remaining after the last piece is selected from a tray, tub, or bundle of mail by writing the number on the Test Schedule or Header Sheet, which can be printed from the CODES Web Base Unit.
- (3) Use this number and continue counting the mailpieces in the next tray, tub, or bundle.

Example 1: If the CODES laptop displays a start number of 6, select the 6th piece of mail. If the mailpiece skip interval is 10, select and set aside for recording the 6th mailpiece, the 16th, the 26th, and so on.

Example 2: After you select the last sample in the tray, 3 pieces remain. Count the first mailpiece in the next tray as No. 4 and continue counting until you reach the skip interval. If the skip interval is 10, select the 7th piece in the tray.

- b. Handling DPS mail:
 - (1) Keep selected pieces of DPS mail separate from the other selected mailpieces.
 - (2) Unless the carrier agrees otherwise, keep DPS mail in its original order.
 - (3) Select the sample mailpieces according to the skip interval and random start number. (The data collector may want to mark the place of each selected mailpiece in the tray by placing the mailpiece that follows it on end.)
 - (4) Record the selected mailpieces individually.
 - (5) Return each mailpiece to its place in the tray before recording the next one.

c. Exceptions:

- Sample any mail that is cased before you arrive. Use the skip interval as explained in <u>334</u>. If the carrier is still casing mail, sample the mail in the case first, then sample the uncased mail. After you finish counting the cased mail, the carrier may case any mailpieces that have been sampled and recorded.
- (2) If mail delivered to the carrier's case before the final pull-down on the day before the test day is not marked for exclusion and is commingled with mail delivered to the carrier's case on the test day, reschedule the test.

34 Recording Selected Mail

For the pieces selected, record class, subclass, compensation category, shape, piece count, and other characteristics.

341 Mail Class and Subclass

Mail class is determined by the weight and content of the mailpiece and by the service provided. See the RG-RCCS for a detailed explanation.

Note: For direct bundles, record the class and subclass of the top piece of mail. Each direct bundle is counted as one mailpiece. The compensation category is "Direct Bundle."

342 Compensation Category

Compensation categories correspond to various shapes and types of mail. These categories are similar to the mail categories in the National Count of Mail on Rural Routes. Use the blue Rural Mail Count Gauge showing a 5-inch and 6 1/8-inch measurement to help determine the appropriate compensation category. If the compensation category is unknown, ask the carrier or postmaster how similar shaped mailpieces are counted in the National Count of Mail. For more information on compensation categories, see the RG-RCCS.

343 Shape

Unlike compensation categories, which are determined based on categories of mail in the National Count of Mail on Rural Routes, shape is determined based on specifications in *Mailing Standards of the United States Postal Service,* Domestic Mail Manual (DMM[®]). For more information on recording shape, see the RG-RCCS.

344 Counting Mailpieces

When counting selected mailpieces:

- a. Group and count together nonaccountable letter and flat mail with the same skip interval and characteristics.
- b. Record parcels and accountable mailpieces individually.
- c. Don't record parcel-shaped mailpieces, such as Enhanced Carrier Route Walking Sequence Saturation (ECRWSS) parcels or Bound Printed Matter phone books when:
 - (1) The parcels are identical and are destined for multiple deliveries on a tested route.
 - (2) Recording additional information would significantly delay the carrier.
- d. After entering the count, flag unlikely combinations of mailpiece characteristics in CODES.
- e. Verify that the characteristics (including class, subclass, and shape) and the count were entered correctly. For unlikely combinations, enter a comment describing the unlikely combination and count.

35 Finalizing the Test

Reviewing the Data and Administrative Information

- a. After entering all mail counts, review the data. If you find errors, return to data entry and correct them.
- For rare or unlikely mail categories, the data-collection software displays warning screens asking the data collector to verify the entries. Add comments about these mailpieces to verify or explain unusual mailpiece characteristics.
- c. Before completing or suspending the test, review all administrative information in the Test Header.

Determining the Time Required to Complete the Test

After reviewing and correcting the data, record the time taken to complete the test, including time spent on these tasks:

- a. Preparing forms.
- b. Communicating with the postmaster, supervisor, and carrier on the day of the test.
- c. Setting up the computer.
- d. Selecting the sample and gathering the mailpieces.
- e. Entering mailpiece data into the computer.
- f. Reviewing data and ending the test.
- g. Traveling to and from the test site.

Note: Do not include time spent off the clock, working on another test, or reading.

Example: On the day before the test, it takes 5 hours to get to the test site from the office and to check into a hotel. On the test day, it takes 15 minutes to get to the test site from the hotel. It takes 1 hour and 10 minutes to prepare for and conduct the test and another 5 hours and 5 minutes to get back to the office. The total time is 11 hours and 30 minutes.

353 Completing Forms

If the test has detained the carrier, the data collector must complete PS Form 2847 so he or she can be paid for time spent on the test. Ask the carrier and postmaster to sign the form; then ask the postmaster to mail it. (For instructions on completing the form, see 37.)

The data collector must complete Section A of PS Form 2848 and give it to the postmaster or designee to complete and mail. Explain to the postmaster what mail to include in the count and where to enter the mail categories. (For instructions, see $\underline{38}$.)

36 Conducting the RCCS Test by Phone

Conducting the rural-carrier test by telephone may be an option. Discuss this with your manager.

361 **Requirements**

- a. Obtain information about the test from a Statistical Programs (SP) manager.
- b. Plan for a phone test several days in advance.
- c. A manager must contact the Statistical Programs Service Center for permission to conduct the test by phone.

- d. Provide the SP manager with the following information about a test to be conducted by phone.
 - (1) The volume of mail expected on the route for sampling on the test day.
 - (2) The amount of driving time expended to conduct the test.
 - (3) The knowledge level of the employees who will be conducting the test with the data collector (or a manager).

Note: The *knowledge level* of an employee includes knowledge of mail classification and definition of the mail to be sampled, and the amount of time that field employees have to correctly conduct the test.

To ensure accurate data collection, it is extremely important to conduct the phone test properly.

362 **Procedures**

To conduct an RCCS test by phone:

- a. Send PS Form 2848 to the office of the route being tested. Explain to the postmaster or designee what mail will be sampled and how various classes, subclasses, and categories of mail are counted.
- b. Send PS Form 2847 only if the test will delay the carrier.
- c. On the day before the test, call the office and verify who will be helping conduct it. Review what will be sampled and the sampling procedures.
- d. In the "Comments" section of CODES, record the name and telephone number of the person conducting the test. For example, enter "Phone test contact: Jane Doe, phone (000) 123-4567."
- e. Tell the person conducting the test that PS Form 2848 must be completed. Explain how to count and record mail on the form. (See <u>38</u> for instructions.)
- f. Explain to the postmaster that PS Form 2847 must be sent only if the carrier is delayed.
- g. If you must reschedule a test because of data-collection problems, conduct it on-site.

37 Completing PS Form 2847, *Rural Carrier Payment Authorization*

PS Form 2847 is used to compensate the rural carrier for time spent on the RCCS test. Complete this form for any RCCS test that delays the carrier. The form is shown in Exhibit 37.

371 Recording Carrier Delays

Record the time the carrier spent on the following:

- a. Listening to you explain the test.
- b. Helping you gather mail.
- c. Performing any other test-related tasks, including filling out PS Form 2847, that require extra time in the office.
- d. Waiting for you to sample and record the mail.

Note: The time required to complete PS Form 2848 is included on PS Form 2847 if the postmaster designates the carrier to count and record the collection mail.

372 Guidelines for Completing PS Form 2847

PS Form 2847 is used when a substitute rural mail carrier who helps to conduct a test is delayed.

- a. The form must be completed at the test site:
 - (1) If a data collector conducts the test on-site, he or she completes the form.
 - (2) If a data collector is not on-site to conduct the test, the carrier and postmaster complete the form.
- Verify that the carrier's Employee Identification Number (EIN) is entered correctly.
- c. Record carrier time in minutes, not hours.
- d. Ensure that both the carrier and postmaster sign the form.
- e. For intermediate offices, ask the intermediate office postmaster to complete and sign the form.
- f. Tell the postmaster to mail the completed and signed form to the Accounting Service Center address printed on the form.

Exhibit 37 **PS Form 2847,** *Rural Carrier Payment Authorization*

POSTA	ED STATES L SERVICE ®		Rural Ca	rrie	r P	ay	me	nt	Auth	nori	izatior
Route Test. Record the number of th Record name	date, location, route t he Rural Route being ne of carrier/carrier su	or every Rural Carrier type, and route tested. ubstitute, roster	 ICTIONS 4. Be sure to rec including all ti the mail, sam the mail. This time spent as: 5. Both carrier a 	me ne ple bo inform sisting	eede oxes natio g in f	ed to , an on is the	o exp id de s us test.	plain elay o ed to	the te cause pay t	est, id d by o he ca	lentify counting arrier for
	, and Social Security		renza - Zhendozen - Izzaniera azari, Son	1715		0.1	2.2				
Date of Test (MM/	Nar	me of Facility		ZIP	+ 4	Code	e				
Facility Finance N	umber Rural Rout	te Type							Rural	Route	Number
		(H, J, K, M, A)								Ĩ	Ĩ
In the second second		Deater Decisestion	Control Constitution Number						Time	A	
Name of Carrier		Roster Designation	Social Security Number						(in Mir		ing on Test

38 Completing PS Form 2848, *Rural Carrier Route Mail* Acceptance Data

PS Form 2848 is used to report the volume of mail the carrier collects as he or she delivers it. The postmaster or designee completes the form, unless the tested site is an intermediate office, in which case follow the instructions in <u>386</u>.

Mail from collection boxes and cluster box collection compartments is not counted on this form.

PS Form 2848 (Exhibit 38) is available on the Postal Service Forms page at http://blue.usps.gov/formmgmt/forms/ps2848.pdf.

381 Data Collector – Sections A, B, and C

The data collector must:

- a. Highlight the administrative data to be completed by the postmaster or designee.
- b. Complete Section A.
- c. Complete Item 2 using leading zeros and a four-digit year (for example, record May 9, 2014, as 05092014).
- d. Obtain the test ID and rural route number from the Test Schedule or Test Header screen.

382 **Postmaster and Carrier – Sections B and C**

- a. The postmaster or designee completes Sections B and C after the carrier returns from the route.
- b. The carrier separates the mail into three tubs:
 - (1) One for online requests for Package Pickup.
 - (2) One for mail collected from individual delivery boxes and brought back to the Post Office.
 - (3) One for all other mail.
- c. When counting, follow the instructions on the form to determine the class and shape categories. Also:
 - (1) Include mail the carrier picks up from any intermediate office.
 - (2) Include mail from intermediate routes when the head-out office is the route being sampled.
 - (3) Do not include mail from collection boxes or cluster box unit collection compartments.
- Use the recipient's address to determine if mail is domestic or international.

383 **Postmaster – Section C**

The data collector must explain to the postmaster or designee how to record collected mail on PS Form 2848.

The Postmaster or designee must:

- a. Record franked mail and penalty mail from U.S. government agencies based on the service provided.
- Record balloting materials endorsed "US Postage Paid 39 USC 3406" as First-Class Mail.
- c. Describe the items counted in "Other."

384 **Postmaster's Responsibility**

The postmaster or designee will mail or fax the form to the data collector whose name and address appears in Section A.

385 After the Test Is Completed

- a. A Statistical Programs (SP) manager or designee must review submitted forms for completeness and accuracy and must discuss any incomplete or inconsistent items with the postmaster or designee.
- b. The SP manager or designee must enter the data on PS Form 2848 into the CODES Web Base Unit and transmit it. For a test that has zero collection volume, he or she must select the appropriate choice in CODES to describe the reason.
- c. Those entering data must bring cross-cell error checks to their manager's attention so that appropriate action can be taken if editing is required.

386 Guidelines for Intermediate Offices

An *intermediate office* is a Post Office that is located on the official line of travel on a rural route and included in the official route description.

If the test site is an intermediate office, the data collector prepares a separate PS Form 2848, writes "Intermediate Office" in item 12 on the front of the form, and completes Sections A and B.

If the head-out office is sampled, include mail picked up from boxes on intermediate routes and brought back to the Post Office.

Exhibit 38	
PS Form 2848, Rural Carrier Route Mail Acceptance Data (page 1 of 2)	

POSTAL SERVICE ®	Rural Carrier Route Mail Acce	ptance Da				
Postmaster Instructions 1. The information obtained from this form will be used to distrib-	 Mail picked up from boxes on intermediate to the Post Office if the head-out office is s 					
 The information obtained non-time form the board to disting ute the costs of rural mail to different classes based on the mail counts of the selected rural route on the assigned test date. You (or your designee) are responsible for collecting and record- 	 Do NOT include in your count: Mail picked up from collection boxes or clution compartments. 	·				
 ind to your designee) are responsible to conecting and record- ing the required information. Your assistance is requested to capture this vital information. Instruct the carrier to provide all mail collected on the test day to you or your designee for counting. Instruct the carrier to separate mail into two tubs;mail from <i>on- line requests</i> for Carrier Pickup[™] (Express Mail[®], Priority Mail[®], and international mail only) should be separated from all other mail. 	 Mail for sampled intermediate offices (routes) — an interm office is a Post Office located on the official line of travel rural route and is included in the official route description intermediate office (route) is selected for sampling, prepaseparate PS Form 2848 and write "Intermediate Office" of front of the form. Other mail that was taken out by the carrier but not deliver example, markup mail). 					
Include in your count:						
 All mail picked up, including <i>online requests</i> for Carrier Pickup, from individual boxes that are returned to the Post Office™. Section A — Completed By Data Collection Technician Full Name of Data collection Technician 	If there are any questions regarding this main tact the data collection technician whose na Telephone No. (Include area code)					
Address (Number and street)	City, State, and ZIP +	- 4 [®]				
Tes	t Office Data					
1a. Name of Facility	1b. City 1c. State 1	d. ZIP Code™				
2. Date Test Taken (MM/DD/YYYY) 3. CAG	4. Finance No. 5 Test I.D. 6	6. Rural Route No				
Section B – Postmaster or Designee (Complete items 7 throug	h 10.)					
7. Name of Postmaster or Designee	8. Telephone No. (in	clude area code)				
Use the Route Number on PS Form 4241-A, <i>Rural Route</i> 9. Type of rural route <i>(Check one)</i> H – 6Day Route J – 5 1/2 Day Route	Evaluation, to determine the Type of Rural Route ar 10. Does Route Have "L" St (Carrier delivers to 12 or motor)	atus?				
M – Mileage Compensation Aux – Hourly Com	npensation 🗌 Yes	No				
Section C — Completed By Postmaster or Designee (Complete 11. Mail or fax the completed form to the attention of the data of 12. Additional Remarks		ection A.				
PS Form 2848, October 2012 <i>(Page 1 of 2)</i> (PSN 7530-03-000-0807	(All previous versions of th					

Exhibit 38 **PS Form 2848,** *Rural Carrier Route Mail Acceptance Data (page 2 of 2)*

Section C — Completed By Postmaster or Design Mail Data Instructions	ee (Continued)	 Reco 			ncies other than	
 If the pieces collected are from online requests for Pickup (Express Mail[®], Priority Mail[®], and internationly), count and record the number of pieces from route in the Carrier Pickup column. If the pieces collected are Registered Mail™ or C count and record the number of pieces from the satthe Registered Mail or Certified Mail columns. For all other collected mail, count and record the pieces collected from the sample route for each pieces route for each pieces. 	ational mail m the sample ertified Mail [®] , ample route in number of	Mail). Reco (e.g., Reco ority Interr recipi DO N the c	rd all franked o First-Class Ma rd Business Re Mail. national mail can ent of the mail. IOT count mail	fficial mail by th il, Priority Mail) ply Mail [®] (BRM n be identified h picked up from	First-Class Mail [®] 1) with First-Class by the foreign add n collection mail neighborhood do	ce provided s Mail or Pri- dress of the boxes and
	Letters, Cards,	Prepaid Parcels ¹	Prepaid Parcels ¹	Other	Certified or Registered	Carrier Pickup
Product Description DOMESTIC MAIL	and Flats	<= 2 lbs.	> 2lbs.	Parcels ²	Mail	(Online)
(Excluding Return Services)						
 First-Class Mail (Include Ballot Mat. U.S. Postage Paid 39 U.S.C. 3406) 						
14. Priority Mail (Except International)						
15. Express Mail (Except International)						
16. Parcel Post [®]						
17. Media Mail [®] and Library Mail						
18. Bound Printed Matter (BPM)						
19. USPS™ Mail						
20. Free Matter for the Blind/Handicapped (Do not include franked official mail' see instructions above)						
DOMESTIC MAIL RETURN SERVICES ONLY						
21. Merchandise Return Service - First-Class Mail						
22. Merchandise Return Service - Priority Mail						
23. Merchandise Return Service - Parcel Post						
 Merchandise Return Service — Bound Printed Matter Merchandise Return Service — Media Maila nd Library Mail 						
26. Parcel Select [®] Return Service (Parcel Return Service) ³ Write in destinating ZIP of one PRS piece 27. First-Class Package Return Service (<i>First-Class</i>						
Returns)						
28. Priority Mail Return Service (Priority Mail Returns)						
29. Ground Return Service (Ground Returns)						
INTERNATIONAL MAIL - U.S. ORIGIN						
30. Global Express Guaranteed [®] (GXG [®])						
31. Express Mail International [®] (EMS [®])						
 Priority Mail International[®] (<i>Flat Rate Envelope Only</i>) Priority Mail International (<i>All others including Flat Rate Box</i>) 						
Atte Box) 34. First-Class Mail International®						
35a.Other (Specifiy below) 35b.Specify (Form 35a)						
¹ Prepaid Parcels are par ² Other Parcels are all pa			÷ · · ·			

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