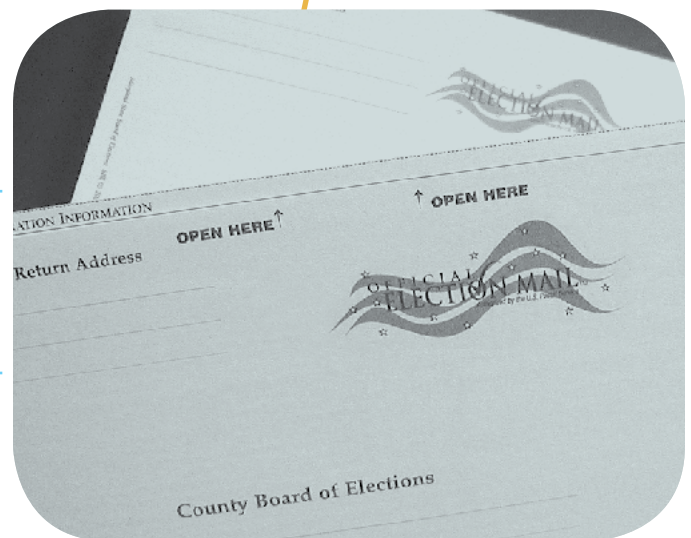

**STATE AND LOCAL
ELECTION MAIL –
USER'S GUIDE**

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How to Use This Guide

You will find eight sections in this guide. Each of the following sections provides information election officials must consider before they mail:

- I. Determining the Appropriate Class of Mail to Use.
- II. Using Reply Mail and Sending Mail to Armed Forces Personnel and Overseas Voters.
- III. Preparing Your Address List.
- IV. Consulting With a Postal Service Election Mail Coordinator to Plan the Mailing.
- V. Filing Required Forms for Postage Discounts and Other Mailing Services.
- VI. Working With a Mailpiece Design Analyst to Ensure Mailpiece Quality.
- VII. Preparing and Presenting the Mailing.
- VIII. Election Mail Checklist.

Each of the sections in this guide contains a brief description of the topic, the most pertinent items to consider, and references for additional information. You can access the information in this guide and additional resources on *usps.com*.

See the following resources:

- The Election Mail Web site at *www.usps.com/electionmail* contains material for preparing mailings, including resources, FAQs, and direct links to the additional references mentioned in this guide.
- Postal Explorer at *http://pe.usps.com* contains information to make informed decisions.
- Quick Service Guides (QSG) at *http://pe.usps.com/text/qsg300/q000.htm* contain concise explanations and useful illustrations covering most Postal Service requirements.
- *Mailing Standards of the United States Postal Service, Domestic Mail Manual (DMM)* at *http://pe.usps.com/DMM300/Index* contains domestic mail information and requirements.

Section I. Determining the Appropriate Class of Mail to Use

The class of mail you use to send your pieces depends on the following:

- What are you mailing (e.g., ballots, newsletters, and registration)?
- Does your mailpiece contain personal information?
- How are the mailpieces designed (e.g., dimensions, and card vs. envelope)?
- How quickly do you need the pieces delivered?
- How many pieces do you have?
- Do you want free forwarding and/or return (if pieces cannot be forwarded or you do not want them forwarded)?
- Will you require extra services (e.g., Certified Mail service, which provides you with a mailing receipt and delivery status)?

The main classes of mail you will want to consider are First-Class Mail and USPS Marketing Mail. The following table summarizes the important features of each.

Class of Mail	Speed	Free Forwarding and Return	Secure Destruction	Extra Services	Presort Discounts	Single Piece
First-Class Mail	Yes	Yes	Yes	Yes	Yes	Yes
USPS Marketing Mail	No	No	No	Certificate of Mailing only Unless for Parcels	Yes	No
Nonprofit USPS Marketing Mail	No	No	No	Certificate of Mailing only Unless for Parcels	Yes	No

What You Are Mailing

First-Class Mail: You may send mailable matter using First-Class Mail service. Some types of mail you must send using First-Class Mail service, including mail that has the character of personal correspondence. First-Class Mail service is closed against postal inspection. For a full definition of what must be sent using First-Class Mail service, see DMM 133.3.0.

USPS Marketing Mail: USPS Marketing Mail is mail that is not required to be sent as First-Class Mail. For a full definition of what you can send as USPS Marketing Mail, see DMM 243.2.0.

Nonprofit USPS Marketing Mail: Under the National Voter Registration Act of 1993 (NVRA), state and local voting registration officials may mail certain USPS Marketing Mail materials that are authorized or required by the NVRA at the Nonprofit USPS Marketing Mail prices, which are lower than the regular USPS Marketing Mail prices. For further information on what organizations are eligible to use Nonprofit prices and what kind of mail can be sent at Nonprofit prices, refer to DMM 703.1.0 and Publication 417, *Nonprofit USPS Marketing Mail Eligibility*. Applicable customer support rulings, such as PS-323, "Computer-Prepared Mailpieces Entered by Nonprofit Organizations," can provide additional guidance and can be found online at <http://pe.usps.com/CustomerSupportRuling/Index>.

How Your Mailpieces Are Designed

The contents, weight, size, and design of your mailpiece can affect the class of mail you can use. First-Class Mail may weigh up to 13 ounces. USPS Marketing Mail, including Nonprofit USPS Marketing Mail, must weigh less than 16 ounces.

Various presort discounts apply to both First-Class Mail and USPS Marketing Mail. Additional discounts are available for automation pieces, which have additional requirements. For further information, see DMM 201.3.1 (cards/letters) and 201.6.0 (flats).

How Quickly You Need the Pieces Delivered

Most First-Class Mail is delivered within 2–5 days. Most USPS Marketing Mail and Nonprofit USPS Marketing Mail pieces take between 3–10 days to be delivered.

Work closely with your local Postal Service coordinator to determine the most likely delivery times for your mailing.

How Many Pieces You Have

There is no minimum for the number of pieces that may be sent at First-Class Mail single-piece prices. If you have at least 500 pieces in the same size category [letter-size or oversize envelopes (flats)], you may be able to send them at First-Class Mail discount prices. For further information, see DMM 233. To send USPS Marketing Mail, you need to have at least 200 pieces or 50 pounds in the same size category. For further information, see DMM 243.

Whether You Want Free Forwarding and Return

The Postal Service offers three options for how it treats mail that cannot be delivered to the address on the envelope. The mail can be forwarded to the new address, returned to you, or discarded.

If you use First-Class Mail, the forwarding and/or return services are free. First-Class Mail may be discarded only when requesting Change Service Requested provided via ACS (see Section III – Move Update Options and note that fees may apply). Secure Destruction is available for First-Class Mail that contains personally identifiable information.

Undeliverable-as-addressed (UAA) USPS Marketing Mail is generally discarded. If you use USPS Marketing Mail and you want the mail forwarded or returned, the mailpiece must have the appropriate ancillary service endorsement printed on the address side of the mailpiece, and you will be charged for each mailpiece that is returned. For more information about ancillary and address correction services available, see DMM 507.1.5.

If You Need Extra Services

The Postal Service has a number of service enhancements, called extra services, available for use with First-Class Mail service. Extra services can be purchased for an additional fee. The extra service that is generally of most interest to election officials is Certified Mail service. The service provides the sender with a mailing receipt and, upon request, electronic verification that the Postal Service delivered or attempted to deliver the mailpiece. For further information, see DMM 503.3.

Section II.

Using Reply Mail and Sending Mail to Armed Forces Personnel and Overseas Voters

Business Reply Mail: If you provide return envelopes for mail such as ballots, consider using Business Reply Mail (BRM) service. BRM is a First-Class Mail service that enables you to pay the return postage (including a per-piece fee), for only the mail returned to you. You can distribute BRM cards, envelopes, self-mailers, cartons, or labels and have them returned to you at any Post Office. The mailpieces you distribute need to conform to a specific format, including use of a unique ZIP+4 code assigned by the Postal Service.

For more information on BRM, see Quick Service Guide 505 and DMM 505.1.0, <http://pe.usps.com/text/qsg300/Q505.htm>.

Qualified Business Reply Mail: If you are anticipating receiving approximately 616 or more return letters, or 591 cards, annually, consider the use of Qualified Business Reply Mail (QBRM). QBRM service provides you with discounts on postage and per-piece fees. It can be used only on automation-compatible cards and letter-size mail weighing up to 2 ounces. The design must be approved by the Postal Service before distribution, and there are requirements for advance deposits and accounting fees. For more information on QBRM, see Quick Service Guide 505 and DMM 505.1.2 and 505.1.6.

Courtesy Reply Mail: Courtesy Reply Mail (CRM) consists of pre-addressed postcards or envelopes that you provide to the voters both to expedite their responses and to provide accurate delivery to the correct return address. CRM differs from BRM in that the voter is responsible for applying the correct postage to the return piece and no permit or fees are required. For further information, see *Courtesy Reply Mail Quick Service Guide 505a*, <http://pe.usps.com/text/qsg300/Q505a.htm>.

Absentee Balloting Materials for Military Personnel and Overseas Voters:

You may send absentee balloting materials through the mail without prepayment of postage when the absentee balloting materials allow eligible persons in the following categories to apply for registration and vote by absentee ballot when absent from their place of voting residence:

- Members of the Armed Forces in active service and their spouses and dependents.
- Members of the U.S. Merchant Marine and their spouses and dependents.
- U.S. citizens residing outside the territorial limits of the United States and the District of Columbia and their spouses and dependents residing with or accompanying them.

You must prepare balloting materials in accordance with DMM 703.8.0.

Shortpaid and Unpaid Absentee Balloting Materials:

Shortpaid and unpaid absentee balloting materials must not be returned to the voter for additional postage. Postage is collected from the election office upon delivery or at a later date. The Postal Service must not delay delivery of balloting materials.

Section III. Preparing Your Address List

Having an updated, correct, and complete address list will help ensure accurate and timely delivery of your mail. By maximizing your address quality, you can also minimize your mailing costs. The Postal Service has established minimum standards for address quality for certain postage prices.

Accurate and standardized addresses will help reduce the amount of undeliverable-as-addressed (UAA) pieces in your mailings. To learn more about the correct way to standardize your addresses, see Publication 28, *Postal Addressing Standards* online at <http://pe.usps.com/text/pub28/welcome.htm>.

Address Hygiene Tools

The Postal Service has a variety of products and services or hygiene tools that will help improve the accuracy of your mailing lists, the quality of the physical addresses, and provide move update information. These products and services are available through either the Postal Service or private mail service providers licensed or certified by the Postal Service.

Physical Address Hygiene and Quality

The following four products will help ensure that all your addresses are deliverable — and also identify those with address deficiencies:

- a. **Coding Accuracy Support System (CASS).** CASS-certified address matching software will help standardize your addresses and update your files with ZIP+4 codes. You can get CASS-certified software from numerous mail service providers or have your own software CASS-certified. Having ZIP+4 codes on your mail improves the speed and efficiency of your mail delivery and can reduce postage prices.
- b. **Delivery Point Validation (DPV).** DPV can confirm the existence of an address on a mailing list as a valid delivery point and helps you identify inaccurate or incomplete addresses. You must use the DPV product in conjunction with CASS-certified address matching software. DPV is available from various vendors or can be acquired by the end user.
- c. **Address Element Correction (AEC).** AEC is an entirely computerized address correction process which uses logic routines to assist in ZIP+4 coding previously un-coded addresses, allowing mail to qualify for discounted automation prices.
- d. **Address Element Correction II (AEC II).** AEC II is for addresses that AEC cannot resolve electronically. In AEC II, addresses are sent to delivery personnel, carriers, and clerks in local Post Offices for resolution.

Move Update Options

Mailers are required to update all addresses on discounted First-Class Mail and USPS Marketing Mail within 95 days before a mailing. The Postal Service makes the following Move Update options available to mailers at reasonable costs. You need to determine which of the following methods works best for your organization:

- a. **NCOA^{Link} Systems.** The NCOA^{Link} process provides change-of-address (COA) data, submitted by customers who have moved and have notified the Postal Service of a change-of-address. Updated 18 month or 48 month computerized change-of-address information is provided on a regular basis to the NCOA^{Link} licensees by the Postal Service. NCOA^{Link} is very effective because it corrects your addresses before you mail.

b. **Address Change Service (ACS).** ACS is a free service that provides mailers a cost-effective means of obtaining current change-of-address information when mail is undeliverable-as-addressed (UAA). ACS allows you to update address files electronically, eliminating the cost, time, and errors of manual keying. ACS provides a data file that includes new address information or the reason your mail cannot be delivered (examples: "Attempted – Not Known" or "Insufficient Address"). The Postal Service may charge an electronic or automated address correction fee for each address correction record provided. With ACS, you get corrected information for your mailpiece after the mailing. For more information about ACS, go to: <https://postalpro.usps.com>.

c. **Ancillary Service Endorsements.** Ancillary service endorsements are used to request an addressee's new address and to provide the Postal Service with instructions on how to handle your mail if it is undeliverable-as-addressed (UAA). "Address Service Requested", "Change Service Requested" and "Return Service Requested" endorsements meet the Move Update standard and provide you with the new address or the reason the mail cannot be delivered through either a separate address correction notice (PS Form 3547, *Notice to Mailer of Correction in Address*) or the return of your mail. Manual address correction fees or return postage may apply. For more information on ancillary endorsements, see DMM 507.1.5.

ACS and ASE (ancillary service endorsements) are post-mailing updates and do not necessarily meet the Move Update requirement for the mailing. As long as you continue to mail to your customers at least once every 95 days using a post-mailing method, and update your addresses to be used on the mailpieces before the next mailing, you are in compliance with Move Update. Otherwise, if you mail more than 95 days after the last mailing or if this is the very first time you mail to an address that you obtain other than directly from your addressee (in the last 95 days), you must use an approved method or mail the pieces at the single-piece First-Class Mail price.

Additional information on how to comply with the Move Update standard can be found in the *Guide to Move Update* at <http://postalpro.usps.com/node/1116> and DMM 602.5 at <http://pe.usps.com/text/dmm300/602.htm>.

More Addressing Tips for Election Mailers

To help you with the processing of your mail, consider including the following information on your mail in addition to the voter name and address:

- Election date or code.
- Voter identification.
- Precinct number or name.
- Party code (primary election only; party code may not be used to disclose to the public the affiliation of the voter).

However, if you include this type of information on your Election Mail, it should be printed so it is not in the optical character read area used by Postal Service processing equipment to read the delivery address. If voter information must appear in the delivery address block area (i.e., address labels are used for both the voter information and the delivery address), then the voter information line must appear above the recipient line of the delivery address.

A Postal Service mailpiece design analyst (MDA) can help you, at no charge, with this and other aspects of proper mail design. For help with mailpiece design, contact a mailpiece design analyst (MDA) by calling the MDA Customer Service Help Desk at 855-593-6093 (hours of operation are Monday–Friday, 7 a.m. to 5 p.m. CT) or send your request by e-mail to mda@usps.gov. Also, mailpiece design information is available online at <https://postalpro.usps.com/mailing/mailpiece-design-analyst-mda-customer-service-help-desk>.

For more information on Postal Service addressing products and services, contact:

NATIONAL CUSTOMER SUPPORT CENTER
UNITED STATES POSTAL SERVICE
225 N HUMPHREYS BLVD STE 501
MEMPHIS TN 38188-1001

TEL.: 800-238-3150
FAX: 901-767-8853

Addressing Official Election Mail to Persons Overseas and in the Military

Foreign addresses except Canada: The very last line of mail addressed to a foreign country should contain the country name printed in capital letters (no abbreviations). When using a foreign postal code, place it on the line above the country of destination.

Example:

MR THOMAS CLARK
117 RUSSELL DRIVE
LONDON W1P 7HQ
ENGLAND

Canadian addresses: For mail addressed to Canada, the last line of the address must show only the country name, written in full (no abbreviations) and in capital letters. There must be two spaces between the province abbreviation and the postal code, as shown below between ON and K1A 0B1.

Example:

MRS HELEN K SAUNDERS
1010 CLEAR STREET
OTTAWA ON K1A 0B1
CANADA

Military addresses: Overseas military and diplomatic addresses must conform to domestic addressing standards format, while including the correct APO, FPO, or DPO and AA, AE, or AP designation. AA, AE, and AP are used for addresses with the 3-digit ZIP Code prefixes 340, 090-098, and 962-966, respectively. APO/FPO/DPO addresses must not include a foreign city and/or country name.

Mail must be addressed to an individual or job title such as "Commander," "Commanding Officer," or other changes. Mail addressed to "Any Service Member," or similar wording such as "Any Soldier," "Sailor," "Airman," or "Marine"; "Military Mail"; or any other vague description, is prohibited.

The correct format and correlating examples are as follows:

- a. Line 1: Job Title and/or Full name.
- b. Line 2: The delivery line (the second line from the bottom in the address) must show the word "UNIT", "CMR" or "PSC" and number; and box number assigned.
- c. Line 3: The bottom line must contain the APO, FPO, DPO ("city") designation and the appropriate two-letter AA, AE, or AP ("state") abbreviation followed by the ZIP Code or ZIP+4 code.

SEAMAN JOHN DOE
UNIT 100100 BOX 4120
FPO AP 96691

JOHN DOE
PSC 5698 BOX 2002
APO AE 09400

For additional information on mailing to foreign countries, consult *Mailing Standards of the United States Postal Service*, International Mail Manual (IMM) available online at pe.usps.com.

Department of State addresses: Overseas mail addressed to Department of State personnel must show on the top line: full name, including first name and middle name or initial; and the delivery line with Unit, number, and Box number assigned. The bottom line must contain the DPO "city" designation and the appropriate two-letter "state" abbreviation (AA, AE, or AP), followed by the ZIP Code or ZIP+4 code.

Example:

JANE T DOE
UNIT 9900 BOX 0500
DPO AE 09701-0500

Section IV. Consulting With a Postal Service Election Mail Coordinator to Plan the Mailing

The Postal Service will help you with every step of your mailing process. Consult with a Postal Service Election Mail coordinator to plan the mailing.

For help with mailpiece design, contact a mailpiece design analyst (MDA) by calling the MDA Customer Service Help Desk at 855-593-6093 (hours of operation are Monday–Friday, 7 a.m.–5 p.m. CT) or by sending your request by e-mail to mda@usps.gov. Also, mailpiece design information is available online at <https://postalpro.usps.com/mailing/mailpiece-design-analyst-mda-customer-service-help-desk>.

Consult With Your Local Postal Service Coordinator

Contact your local Postal Service Election Mail coordinator to arrange a meeting. You may also want to have direct contact with all local Post Offices within your county to help coordinate your mailing. In the meeting, include the following people:

- All your personnel involved in ordering, designing, addressing, and preparing mail.
- Any outside mail service providers or suppliers you are using.

In the meeting, your Postal Service Election Mail coordinator will discuss the logistics of your mailings with you, including the following:

- **Delivery date.** When planning the date, you will want to consider the size of the mailing, the time sensitivity of the contents, and the class of mail (e.g., First-Class Mail, USPS Marketing Mail). For ballots, take into consideration holidays and 3-day weekends so that ballots will not sit in mailboxes over a long weekend. The Postal Service delivers 6 days a week, Monday through Saturday, but does not deliver on national holidays. Because different classes of mail have different service standards, the Postal Service recommends the use of First-Class Mail service to obtain timely delivery.

- **When to give the mailpieces to the Postal Service.** The Postal Service can help schedule a time that allows for the immediate acceptance of your mailing. If more than one county is involved, it is important to coordinate the time of acceptance for each.
- **Where to give the mail to the Postal Service.** Typically, you will give your mail to a business mail entry unit, but larger Post Offices may need to direct the mailing to a specific dock area.
- **Bulk preparation supplies and equipment you will need.** Talk with your Postal Service Election Mail coordinator about Postal Service supplies (e.g., forms, tags, trays, and sacks), and when and where you can order them. There are no charges for these items. The Postal Service recommends the use of Tag 191, *Domestic and International Ballots*, on tray and sack containers to identify official ballot mail only (not other mailings) while in the mailstream.
- **Required forms and mailing profiles.** Forms are required if you want to mail at bulk (large-volume) discount postage prices for First-Class Mail, USPS Marketing Mail, or Nonprofit USPS Marketing Mail.
- **Options for mail that cannot be delivered.** Discuss how you want the Postal Service to handle mail that is UAA; see Address Change Service and Ancillary Service Endorsements in Section III.
- **Return address options.** You have a number of options where completed ballots will be mailed back, including the following:
 - Use your office address and ZIP+4 code.
 - Rent a Post Office box. This service allows you to pick up your mail during the hours the box lobby is open.
 - Rent a “phantom” Post Office box (caller service). Caller service is a premium service available for a fee, which allows you to pick up mail at a Post Office call window or loading dock when the office is open.

Section V. Filing Required Forms for Postage Discounts and Other Mailing Services

The forms you will need are available through your local Post Office and at <http://about.usps.com/forms/welcome.htm>.

For Postage Discounts Use PS Form 3615

If you want to send your mail using First-Class Mail service or USPS Marketing Mail and receive discounts based on the volume and preparation of your mailings, you will need to obtain a permit from the Postal Service. This can be done by using PS Form 3615, *Mailing Permit Application and Customer Profile*.

For Authorization for Nonprofit Status Use PS Form 3624

If you want to mail any of your mailpieces using Nonprofit USPS Marketing Mail prices, you will first need to obtain authorization from the Postal Service. To do so, submit PS Form 3624, *Application to Mail at Nonprofit USPS Marketing Mail Prices*, to apply with supporting documentation.

For more information, see Publication 417, *Nonprofit USPS Marketing Mail Eligibility*.

For Business Reply Mail Use PS Forms 3615 and 6805

To apply for a permit to use BRM, complete PS Form 3615, *Mailing Permit Application and Customer Profile*.

Once you have your permit, you can give permission to your authorized representative to distribute and receive BRM pieces at other Post Offices using your permit number. For further information, see DMM 505.1.1 and 505.1.3

PS Form 6805, *BRM/QBRM Application for ZIP+4 Code Assignment/Validation and QBRM Approval*, needs to be filled out for any new BRM account. If you want to use QBRM, you will also need to complete PS Form 6805. PS Form 6805 is now dual-purpose:

- (1) for obtaining the required unique ZIP+4 codes, whether they are used for BRM or QBRM, and
- (2) for use as the QBRM-approval form. For further information, see DMM 505.1.1.3 and 505.1.6.

Section VI. Working With a Mailpiece Design Analyst to Ensure Mailpiece Quality

Mailpiece design is one of the most critical components in determining your mailing costs. Properly designed mail can allow you to receive automation price discounts.

Consult With a Mailpiece Design Analyst Before Printing Your Envelopes

Most of your questions about mailpiece design can be answered by a Postal Service mailpiece design analyst (MDA).

Consult with an MDA to discuss the design for the cover or envelope of every mailpiece you plan to mail (e.g., postcards, envelopes, or larger mail such as manila envelopes and catalogs, also known as flats). This service is free, and it can save significant costs for your mailing operation and unforeseen delays in delivery.

Provide at least 25 examples to the MDA for review, using new samples, or if none are available, materials from similar past mailings. The MDA will check to see if they meet current Postal Service standards for automation (e.g., envelope dimensions, paper stock, and ink colors for readability) and general mailability.

Ask the MDA to do the following:

- Help you design outgoing and return envelopes to meet automation-compatibility standards.
- Review and assist with proper wording and placement of postal markings and endorsements on your envelopes.
- Review the blueline or PDF file of your envelopes, postcards, and other mail before it is printed and provide recommendations for improvement.

More Design Tips for Election Mailers

- Always consider using the Official Election Mail logo. The purpose of the Official Election Mail logo is to alert all Postal Service employees that the mail with the logo is either from or to an official state or local voter registration organization or election official, and appropriate handling should be provided.
- Consider possible weight limitations. Printing instructions and information on both sides of forms will reduce the amount of paper and overall weight of your mail, saving postage costs.
- Consider different colors for different ballot types, districts, elections, parties, or inserts. Instead of colored envelopes, consider using colored bands that encircle only part of the envelopes, but away from the delivery address. Discuss this with your MDA.
- Some ink and paper colors will not work well on automated postal equipment. Discuss potential colors with your MDA.
- You must prepare balloting materials in accordance with DMM 703.8.0.

Design Resources

Other sources of information include:

- Quick Service Guides. The Quick Service Guides (QSG) provide information covering design of letters, cards, flats, and various reply forms for automation compatibility, along with schematics, as well as the requirements for absentee ballot envelope design. Find them at pe.usps.com.

- Postal Explorer. You can find most of the information you need to make informed decisions on Postal Explorer at *pe.usps.com*, especially the mailpiece design information available online at *https://postalpro.usps.com/mailing/mailpiece-design-analyst-mda-customer-service-help-desk*.
- Publication 25, *Designing Letter and Reply Mail*.
- Publication 28, *Postal Addressing Standards*.
- Publication 177, *Guidelines for Optimizing Readability of Flat-Size Mail*.
- Publication 178, *Recommendations for Designing Flat-Size Mail*.
- Election Officials' Mailing Resources page at *www.usps.com/electionmail*.
- Publication 631, *Official Election Mail — Graphic Guidelines and Logos*.

Section VII. Preparing and Presenting the Mailing

At Least 2 Weeks Before Election Day, Finalize Your Plans

- Let your Postal Election Mail team know if you want to pick up returning ballots at a Postal Service facility each day or have them delivered to your election office with your regular mail. If you want to pick up your mail, coordinate with your Postal Service Election Mail coordinator to see if this can be arranged and the best time for pick up. This option will allow you to get the Election Mail as early as possible. This is another reason to consider using Post Office box service or caller service.
- Let your Postal Service Election Mail coordinator know your cut-off time for receiving returned ballots. Arrange the latest time when an election official may pick up last-minute returns.
- Obtain pallets, trays, sacks, labels, tags, and stickers. If you use a mailing service, be sure to verify that the service will be providing all the needed supplies or can obtain them for you.
- Depending on what you are mailing, present one or more of the following forms to the Postal Service along with your mail:
 - PS Form 3600 series for First-Class Mail.
 - PS Form 3602 series for USPS Marketing Mail (Regular or Nonprofit).
- These forms are available on the Postal Service Web site. Go to <http://about.usps.com/forms/all-forms.htm>.

Section VIII: Election Mail Checklist

This suggested checklist will help ensure a successful mailing.

Step 1. Call your Postal Service Election Mail Coordinator.

See Section IV and link:

<http://about.usps.com/gov-services/election-mail/>

- Discuss the specific purpose for the mailing (e.g., information, ballots, and voter registration).
- Discuss when you intend to present the mail to the Postal Service.
- Discuss your delivery date requirements.
- Discuss if this is a Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA)-eligible mailing.
- Determine if the mailing must go as First-Class Mail. USPS recommends the use of First-Class Mail postage on all outbound absentee or vote-by-mail ballots.
- Determine if the mailing can go as USPS Marketing Mail. USPS Marketing Mail is limited to one solicitation (e.g., "Please Vote!", "Register to work as a poll worker" or "Request an absentee ballot"). Mailpieces that contain more than one solicitation must be sent as First-Class Mail.
- Determine where and when the mailpieces must be presented to the Postal Service to meet your desired delivery dates.
- Determine the volume of the mailings.
- Determine the best method of receiving return mail (e.g., street delivery, PO Box or Caller Service). Caller Service is a premium service available for a fee to any customer who:
 - Requires more than free carrier service.
 - Receives or plans to receive more mail than can be delivered to the largest available Post Office Box at the facility.
- Determine the best time to pick up the mail each day.
- Determine the latest time when an election official can pick up returns.
- Determine the final date for receiving return mail.
- Determine the necessary postal equipment and supplies needed.
- Determine payment method.
- Determine what forms are needed for mail entry and postage payment.
- Determine if the mailing must meet address or Move Update requirements.
- Determine if the mailing needs to have an ancillary service endorsement (e.g., Return Service Requested).
- Determine if the mailing needs any Extra Services (e.g., Certified Mail, Return Receipt Requested, and Registered Mail).

Step 2. Determine if the mailing needs to include a reply piece (See Section II).

- Decide if you plan to use Business Reply Mail or Courtesy Reply Mail.
- Decide if it is cost effective to use Qualified Business Reply Mail (QBRM).

Step 3. Prepare your address list (See Section III).

- Decide who should receive the mailpieces.
- Compile your address list.
- Ensure proper address list hygiene.
- Validate physical address accuracy.
- Validate that you meet the Move Update standard, if applicable.

- NCOALink — The NCOALink product is a secure dataset of approximately 160 million permanent change-of-address (COA) records consisting of names and addresses of individuals, families, and businesses who have filed a change of address with the Postal Service. Developed with secure data store technology to increase security of postal customer data and protect the privacy of this information, the NCOALink product enables mailers to process mailing lists and update lists with new addresses prior to mailing. The NCOALink data is provided on a regular basis to companies that have been licensed by the Postal Service.

Step 4. File required forms for postage discounts and other mailing services (if needed) (See Section V).

- PS Form 3615, *Mailing Permit Application and Customer Profile* (for Permit Imprint and Business Reply Mail permits).
<http://about.usps.com/forms/ps3615.pdf>
- PS Form 3624, *Application to Mail at Nonprofit USPS Marketing Mail Prices*.
<http://about.usps.com/forms/ps3624.pdf>
- PS Form 3623, *Request for Confirmation of Authorization (or Pending Application) to Mail at Nonprofit USPS Marketing Mail Prices*.
<http://about.usps.com/forms/ps3623.pdf>
- PS Form 1093, *Application for Post Office Box Service*.
<http://about.usps.com/forms/ps1093.pdf>
- PS Form 1093-C, *How to Apply for Post Office Caller Service*.
<http://about.usps.com/forms/ps1093c.pdf>
- PS Form 6805, *BRM/QBRM Application for ZIP+4 Code Assignment/Validation and QBRM Approval*.
<https://about.usps.com/forms/ps6805.pdf>

Step 5. Review mailpiece design

The Postal Service recommends that Election Officials always have all ballot envelope designs, previous as well as new designs, that will be used reviewed by a Mailpiece Design Analyst (MDA). Mailpiece review typically occurs within 48 hours of submission. Election Officials have, in some instances, made design

decisions without consulting an MDA. Some uninformed decisions have resulted in envelopes that are not automation compatible and/or returned to the voter.

For assistance with mailpiece design, contact an MDA by calling the MDA Customer Service Help Desk at 855-593-6093 (hours of operation are Monday–Friday, 7 a.m.–5 p.m. CT) or by sending your request by e-mail to mda@usps.gov. Also, mailpiece design information is available online at <https://postalpro.usps.com/mailing/mailpiece-design-analyst-mda-customer-service-help-desk>.

MDAs are trained to do the following:

- Provide pre-mailing piece design consultation.
- Provide technical assistance to printers, graphic designers, and envelope manufacturers.
- Provide guidance on class of mail options based on:
 - Delivery standards.
 - Service levels.
 - Postage prices.
 - Presort requirements.
 - Content requirements.
- Review mailpieces for adherence to USPS standards.
 - Ensure that location of elections office/agency related content does not interfere with Postal Service regulations or processing.
 - Test paper and mail samples for thickness, size, shape, weight, color, flexibility, and Intelligent Mail barcode (IMb) tolerances.
 - Analyze readability of actual mailpieces.
 - Provide assistance with mailpiece design evaluations of Political Mail and Official Election Mail.
 - Verify:
 - ZIP+4.
 - Official Election Mail logo size and placement.
 - Endorsements.

- Before artwork is sent to printer, finalize design with MDA and submit pre-production proof.

Postal Service design recommendations.

USPS highly recommends that Local Election Officials use available Postal Service support resources: Election Mail Coordinators and Mailpiece Design Analysts.

- Use letter-size reply envelopes.
 - The Postal Service highly recommends the use of letter-size reply envelopes. The use of letter-size reply envelopes will increase the operational likelihood that the ballot receives a postmark.
- Consider appropriate colors, weight limitations, proper wording, placement of postal markings, etc.
 - Use pastel colors (USPS guidance on appropriate colors to use).
 - Local Election Offices should standardize use of envelopes by color for each election type (e.g., primary/general/special/school.)
- First-Class Mail "Best Practices"
 - Local Election Officials should use First-Class Mail service rather than USPS Marketing Mail service when paying for the delivery of outbound absentee or vote-by-mail ballots. Most First-Class Mail is delivered within 2–5 days. Most USPS Marketing Mail is delivered within 3–10 days.
 - Use USPS-approved practices to maximize postage discounts for First-Class Mail (e.g., presort First-Class Mail).

Postal Service DMM requirements.

- USPS requires that the balloting materials for all types of absentee ballots, whether disseminated in hardcopy or electronically, must indicate in a prominent location the proper amount of First-Class Mail postage that must be paid. This information must be included in the balloting materials.

- Alternatively, the marking "Apply First-Class Mail postage here" may be printed in the upper-right corner of the address side of the envelope used by the voter to return the ballot to election officials. USPS will also accept approved variations of the above markings. Additionally, balloting materials must indicate, in a prominent location, the specific amount of First-Class Mail postage required for the return of the ballot to election officials. The marking requirements will not apply to balloting materials that are qualified under the special exemptions specified by USPS (see DMM 703.8.0).

- For the design of reply envelopes do as follows:
 - Use the Official Election Mail Logo on all Official Election Mail because:
 - Voters recognize the mail as important.
 - Postal Service workers can distinguish the mailpiece from the thousands of other mailpieces processed daily.
 - Use IMb to increase the electronic visibility of the absentee ballot in the mail stream to assist in the proper processing and timely delivery of voted absentee ballots.
 - Use Informed Visibility (IV) Mail Tracking and Reporting, a service which provides:
 - Near real-time mail tracking data for letter and flat pieces, bundles, handling units (trays, tubs, and sacks), and containers as mail moves through the mailstream, enabling you to better plan election mail resources.
 - Flexible data provisioning and data delegation, allowing you to receive the data you want, when you want it, and how you want it.

Step 6. Prevent late ballots with essential voter communication.

- Election Officials should consider including a voter notification in the ballot material packet to ensure the timely delivery of ballots. Return-by mail-date guidance is based on state and local laws, but could include:
 - For domestic nonmilitary voters, the Postal Service recommends that voters mail their ballots at least 1 week out from the due date to account for any unforeseen events or weather issues.
 - For APO/FPO the Military Postal Service Agency recommends that military personnel serving overseas follow the return-by-mail date for their location published at: <http://usps.com/electionmail/>.
- Voters returning their ballots via a Postal Service retail location may ask window clerks to roundstamp/hand cancel the postage. The roundstamp contains the date that the mail is accepted at a USPS office.

Step 7. Prepare and present the mailing (See Section VII)

- Print mailing in time for preparation and delivery to the Post Office facility.
- Obtain postal supplies and equipment (e.g., trays, stickers, and tags).
- Prepare mailing for delivery to the Post Office.
- Obtain and complete postage statements to be presented with the mailing:
 - If using First-Class Mail, use one or more forms in the 3600 series.
 - If using USPS Marketing Mail, use one or more forms in the 3602 series.
- Affix Tag 191 on all Domestic and International Ballot mailings. USPS recommends that all trays and sacks with mailings of ballot materials affix Tag 191, *Domestic and International Ballots*. This bright green tag provides a high degree of visibility on ballot mail as it enters Postal Service processing centers.

- To obtain Tag 191, Election Officials should contact their Business Mail Entry Unit at: <https://postalpro.usps.com/locators/find-bme>.
- Or visit: <http://about.usps.com/gov-services/election-mail/> to order Tag 191 online.

NOTE: Tag 191 can ONLY be applied to ballot mail, such as Vote-by-Mail Ballots or Absentee Ballots.

- Present mailing, postage statement, and, if necessary, check (payment) for funding postage account.

Note: The following are amongst the many trademarks of the United States Postal Service: ACS™, AEC II®, Business Reply Mail®, CASS™, Certified Mail®, Courtesy Reply Mail™, DMM®, DPV®, First-Class Mail®, IMM®, NCOALINK®, Official Election Mail logo®, Official Election Mail™, PO Box™, Post Office™, Postal Explorer®, Postal Service™, Priority Mail Express®, Qualified Business Reply Mail™, Registered Mail™, USPS .com®, USPS®, USPS Eagle logo, USPS Marketing Mail®, ZIP Code™, ZIP+4® .

