







## STEPS FOR IDENTIFYING AND RECOVERING LOST POSTAGE

**Postage Meters** – It’s critical to locate prior meter accounts and compare this to the current population. Look for any current and past reports you may have received from your postage meter provider. We also recommend doing a search of your accounts payable system going as far back as possible. Enter the mailing vendors’ names and see where you had expenses that may no longer be active. When contacting the meter vendor to validate available funds, try to have the following information: location name, address, account number, postage account (Prepaid or advance, invoice number, serial number).

Once the funds have been identified, the vendor can send you a link to their online form where the funds can be requested.

Funds may also be available where you had office closures or had changed meter vendors. Finally, it is important to know your balances in all active accounts because it is common to find funds sitting dormant in prepaid postage accounts when the location is actively using an advanced funds or vice versa.

**Permit Accounts** –The USPS offers very limited support in the area of permit accounts. However, the best way we have found to combat this is to go through your accounts payable files and look for transactions paid to “USPS”, “United States Postal Service” or “Postmaster...”. If you spent over \$200 on an item on the invoice, take a closer look because that is a typical annual permit fee too. You will need to capture the following information for your search:

location name, address, permit number, permit type, USPS Post Office name, USPS Post Office addresses.

Go to your local Postmaster to validate if funds are available. If you are large enough and have a postal liaison, you can ask them for assistance. Once the funds have been identified, fill out a PS Form 3533 to have the money returned. The USPS may be reluctant to want to help with the process either due to resources or lack of understanding of the issue. It is important that you stress they are acting like a bank when holding your funds and they should be held to the same fiduciary standards. It is your right to request that they search for funds that you held in their coffers.

**Mail Service Providers** – You would want to follow the same accounts payable search that you did in the sections above but in this case, look for businesses that had provided mailing services for you in the past. Some organizations code this expense in their systems when the transactions are being entered and others might need to remember what vendors had been used in the past. Go back to these providers and ask for any documentation detailing postage accounts they had maintained in your name to validate that all funds had been returned.

## BEST PRACTICES FOR PREVENTING THIS FROM HAPPENING IN THE FUTURE





**Postage Meter Accounts** – It is important to have online visibility to your postage balances. Most meter vendors can give you web access to this information. This is an easy way to check your balances and see every time the meter is filled. If you have multiple meters, link them to this same online visibility, and if possible, onto master account numbers. Now, if any office closes, the money will automatically go back into the master account to be used by other locations. Finally stick with one prefunding or advance postage strategy so funds cannot get confused.

**Permit Accounts** – Link all permits to the Centralized Accounts Processing System (CAPS) or create visibility on the Business Customer Gateway. This way, you can go onto the USPS website and see your account balances and transactions where funds were withdrawn. The best part is you can manage the funding and permit fees from one place rather than scrambling last minute to pay postage for mailing projects.

**Mail Service Providers** – Use as few providers as possible. As part of the scope, have quarterly reviews where the details of your mailings, invoices and account balances are discussed. Make sure to go over at least a couple of invoices to understand their format and request additional detail if necessary.

## SUMMARY

As we migrate to digital, we are mailing from fewer places and with fewer providers. With fewer experts to manage postage, it can be expected that more funds will be lost. By understanding what can happen to your funds, and by developing structure around its future management, you can eliminate potential lost postage for your organization.

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