UNITED STATES POSTAL SERVICE ®

CASS™ Summary Report

This form may be generated as the output of address matching processing using CASS Certified™ software in conjunction with current USPS® address database files. Any facsimile must contain the same information in the same format as the printed form.

See DMM® Section 602 for more information.

A. Software

CASS A1

1. CASS Certified Company Name Initium Software LLC	2. CASS Certified Software Name & Version Instant Address V08.50.O	3. Configuration WIN
4. Z4Change Certified Company Name	5. Z4Change Certified Software Name & Version	6. Configuration
7. eLOT® Certified Company Name Initium Software LLC	8. eLOT Certified Software Name & Version Instant Address V08.50.O	9. Configuration WIN

MASS A2

1. MASS™ Certified Company Name	2. MASS Certified Software Name, Version & Model No.	3. Configuration
		4. MLOCR Serial No.

B. List

1. List Processor's Name	**2. Date List Processed**	**3. Date of Database Product Used**
University of Montana Foundation	a. Master File 06/05/2025	a. ZIP + 4® File 06/01/2025
	b. Z4Change	b. Z4Change
	c. eLOT 06/05/2025	c. eLOT 06/01/2025
	d. CRIS 06/05/2025	d. CRIS 06/01/2025

4. List Name or ID No. (If using ID No., number must start with ID #) ID#a583705c-6ecd-475f-8387-3449bb6adfa9	5. Number of Lists 1	6. Total Records Submitted for Processing 307

C. Output

Output Rating	1. Total Coded	2. Validation Period		Output Rating	1. Total Coded	2. Validation Period	
a. ZIP + 4/DPV Confirmed ▶	307	From 06/05/2025	To 08/31/2025	c. 5-Digit Coded ▶	307	From 06/05/2025	To 02/27/2026
b. Z4Change Processed ▶				d. CRRT Coded ▶	292	From 06/05/2025	To 08/31/2025
				e. eLOT Assigned ▶	287	From 06/05/2025	To 08/31/2025

D. Mailer

I certify that the mailing submitted with this form has been coded (as indicated above) using CASS Certified software meeting all of the requirements listed in the DMM Section 602.

1. Mailer's Signature	2. Date Signed

3. Name and Address of Mailer

E. Qualitative Statistical Summary (QSS)

For informational Purposes Only: QSS is solely made available for the list processor's review and analysis. This information is not to be considered by the U.S. Postal Service® personnel in determining rate eligibility under any circumstances. See reverse for a detailed explanation.

High Rise Default	High Rise Exact	RR Default	RR Exact	LACSLink®	EWS	SuiteLink®
3	41	0	0	4	0	0

Privacy Notice: For information regarding our Privacy Policy, visit USPS.COM®.

Instructions

A. Software

A1.1, 1.4, 1.7, & A2.1 – Company Name: Enter the name for *each kind of software* as it appears on the CASS™/MASS™ certificate.
A1.2, 1.5, 1.8, & A2.2 – Software Name and Version: Enter name and version for *each kind of software* as it appears on the CASS/MASS certificate.
A1.3, 1.6, 1.9, & A2.3 – Configuration: Enter the specific software configuration parameter settings as it appears on the CASS/MASS certificate.
A2.4 – MLOCR: Enter the MLOCR Serial Number as it appears on the MASS Certificate.
NOTE: If information entered in this section represents the list processing of more than one certified company, attach a list of company names, software names and versions, as well as the configuration to code the address information used in the mailing.

B. List

1. List Processor's Name: Enter the company name that coded the address list(s) and/or performed ZIP + 4®/DPV® confirmation using CASS Certified™ software. Attach a list if additional space is required.
2. Date List Processed: Enter the processing date for each list. If multiple lists, enter the oldest date from the list.
3. Date of Database Product Used: Enter the version date of each database package used for processing. If multiple lists, enter the oldest version date from the lists.
4. List Name or ID No.: Print the name or identification number of the address list. If more than one list is used, leave blank. If the identification number is used, the number MUST be preceded by "ID#".
5. Number of Lists: Enter the number of lists used to produce the mailing.
6. Total Records Submitted for Processing: Enter the total number of address records *(from all lists in item B5)* submitted at the time the list(s) was coded.

C. Output

1. Total Coded: Enter the total number coded.

2. Validation Period: Coding must be done using a product release that is within the USPS Product Cycle, as provided in the table below:

Product Name	From Date	To Date
ZIP + 4 / DPV Confirmed	The date the file was processed, which is 10 - 15 days before the Product (Publish) Date and no later than the file Expiration Date (last permissible use date).	Last day of the month following the Expiration Date (last permissible use date) of the Date of Database Product used (identified in Section B.3).
Five-Digit Coded	The date the file was processed, which is 10 - 15 days before the ZIP + 4, Carrier Route Product Publish Date and no later than the ZIP + 4, Carrier Route Product Expiration Date (last permissible use date) or 180 days before the Five-Digit ZIP product file date.	180 days after the Expiration Date (last permissible use date) of the Product Date used. NOTE: This is different than the other dates. This one is calculated, not hard-coded.
Total Carrier Route Coded	The date the file was processed, which is 10 - 15 days before the Product (Publish) Date and no later than the file Expiration Date (last permissible use date).	Last day of the month following the Expiration Date (last permissible use date) of the Product Date used.
eLOT® Sequence No. Assigned	The date the file was processed, which is 10 - 15 days before the Product (Publish) Date and no later than the file Expiration Date (last permissible use date).	Last day of the month following the Expiration Date (last permissible use date) of the Product Date used.

Release Date (Posted)	Product Date	Required Use Date	Expiration Date (Last permissible use date)	Last Permissible Mailing Date
Use of file released in...	(Publish Date)	Must begin no later than...	And must end no later than...	
Mid-November	December 1	January 1	February 28/29	March 31
Mid-December	January 1	February 1	March 31	April 30
Mid-January	February 1	March 1	April 30	May 31
Mid-February	March 1	April 1	May 31	June 30
Mid-March	April 1	May 1	June 30	July 31
Mid-April	May 1	June 1	July 31	August 31
Mid-May	June 1	July 1	August 31	September 30
Mid-June	July 1	August 1	September 30	October 31
Mid-July	August 1	September 1	October 31	November 30
Mid-August	September 1	October 1	November 30	December 31
Mid-September	October 1	November 1	December 31	January 31
Mid-October	November 1	December 1	January 31	February 28/29

D. Mailer

1. Signature: Signature of individual who processed the list, or the mailer's representative.
2. Date Signed: Enter the date this form is signed.
3. Name & Address of Mailer: Enter the name and address of the individual whose signature appears in item D1.

E. Qualitative Statistical Summary (QSS)

This information allows mailers and list processors to evaluate the quality of their address list processed through CASS software before its contents enter the mailstream. Although these addresses remain eligible for postal automation rate discounts, significant number of Highrise default/rural route default matches increases the costs and reduces the efficient delivery of this mail. Mailers should research to obtain secondary unit designator address information or highrise addresses and specific box number information for rural route addresses which are coded to default records on the National ZIP + 4 File.

Highrise Default/RR Default
Entries in this box show the number of addresses that were default matched. Defaults are matches made to addresses that contain invalid/missing secondary address or box information. A highrise default contains the building street address in the primary range field and spaces in the secondary range field. A rural route default contains the route number in the primary name but also has spaces in the primary address range.

LACS^Link® System
Entries in this box show the number of addresses which have been converted through the LACS^Link process. LACS^Link is a data product provided by the Postal Service to allow addresses that have been converted due to addresses that have been renamed or renumbered, or for 911 emergency systems to be linked with their new address.

Early Warning System (EWS)
Entries in this box show the number of addresses on the processed address list that are new addresses not in the current U.S. Postal Service® ZIP + 4 File. These addresses are, however, valid addresses as formatted and should not be changed in any way since the U.S Postal Service will assign ZIP + 4's to these addresses on the next monthly ZIP + 4 File.

Suite^Link® System
Entries in this box show the number of ZIP+4/DPV confirmed addresses that matched to a highrise default, and the Suite^Link process returned the appropriate suite number. Only Suite^Link enabled software will return a value in this box *(Check with your software vendor for obtaining this option)*. These address records are valid delivery points by the U.S. Postal Service. Addresses that are not confirmed by DPV are either new addresses not available on the current Delivery Sequence File, or are not valid and the list holder should further investigate to determine the accuracy of these addresses. Mailers should make every effort to ensure the quality of their address list(s).