

# 3 Application for Authorization

## 3-1 ORIGINAL MAILING OFFICE

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### 3-1.1 General

A responsible officer of your organization must apply for an authorization to mail at the Nonprofit Standard Mail rates at each post office where mailings will be entered. As discussed in this chapter, the initial authorization — as well as subsequent authorizations to mail at other post offices — requires specific forms and documentation.

Required documentation includes proof of your organization's nonprofit status and that your organization meets one of the qualifying categories.

Qualified political committees and voting registration officials, however, are exempted from the requirement to document nonprofit status.

### 3-1.2 Completing PS Form 3624

To begin the process, you must complete an application for authorization to mail at the Nonprofit Standard Mail rates (PS Form 3624, *Application to Mail at Nonprofit Standard Mail Rates*). This application is available at any post office. Your postmaster can answer your questions and help you fill out the form. (See appendix E for a sample that you may use.)

### 3-1.3 General Documentation Requirements

To support your organization's eligibility for the Nonprofit Standard Mail rates, attach copies of these documents to PS Form 3624:

- Formative papers. Formative papers describe your organization's primary purpose. These papers include articles of incorporation, a constitution, or a charter endorsed by the appropriate civil authorities.

- Evidence of nonprofit status. Evidence of your organization's nonprofit status may be a copy of the tax exemption letter from the Internal Revenue Service. This letter shows your organization's exemption from the payment of federal income tax and cites the section of the Internal Revenue Code under which your organization is exempt (for example, 26 U.S.C. 501(c)(3)). Alternatively, you may use a complete financial statement from an independent auditor — such as a certified public accountant — substantiating that your organization is a nonprofit organization. A statement from a member of your organization, however, is not sufficient.

### 3-1.4 Additional Documents Concerning Operation

Also, provide as many of these documents as available:

- List of activities. This list shows the activities that your organization engaged in during the past 12 months.
- Financial statement. This statement details your organization's receipts and expenditures for the past fiscal year and includes a copy of your organization's budget for the current year.
- Other documents of operation. These documents include your organization's bulletins, minutes of meetings, brochures, and similar papers that show how your organization operates.

### 3-1.5 Political Committees and Voting Registration Officials

Qualified political committees and voting registration officials also must complete PS Form 3624, providing the appropriate documents with their applications as follows:

- Qualified political committees must submit organizational or other documents substantiating that the committee is the state or national committee of the political party.
- Voting registration officials must submit a copy of the statute, ordinance, or other authority establishing responsibility for voter registration.

### 3-1.6 Submitting Application

#### 3-1.6.1 Where to File

Take the application (PS Form 3624, *Application to Mail at Nonprofit Standard Mail Rates*) with the supporting documents to the post office where your organization intends to mail.

#### 3-1.6.2 Review Process

The post office reviews the application and attachments for completeness, then forwards them to the Nonprofit Service Center in Memphis, Tennessee. The Center notifies your organization directly of its decision on the application to mail at the Nonprofit Standard Mail rates. Moreover, the Center may request more information before approving or denying the application.

If the documentation is complete, the review process normally takes 2 weeks. If more information is needed to substantiate eligibility, the process can take longer.

### 3-1.6.3 Refund for Mailings While Application Pending

While the application for authorization to mail at the Nonprofit Standard Mail rates is pending, your organization must pay postage at the applicable rates for First-Class Mail or regular Standard Mail (A).

If the application is approved, your organization is eligible for a refund of the difference in postage between the regular Standard Mail (A) rates paid and the applicable Nonprofit Standard Mail rates for mailings entered after the effective date of the application (that is, the date when the application was filed or the date when the organization first met the eligibility requirements for Nonprofit Standard Mail rates, whichever is later).

To qualify for any refund of postage for mailings entered at the regular Standard Mail (A) rates, you must contact your postmaster to arrange to mail under the deposit system. Refunds are not available for mailings entered as First-Class Mail.

## 3-1.7 Appealing Denied Application

### 3-1.7.1 Notification

The Nonprofit Service Center provides written notification if your organization is found ineligible for the Nonprofit Standard Mail rates. You may file a written appeal of the denial within 15 days. Submit the appeal to the postmaster at the post office where you filed the application. The postmaster then forwards your appeal with the supporting documentation to the Nonprofit Service Center.

### 3-1.7.2 Appeal Letter

Your appeal letter should include, or have attached, only new evidence or arguments on which the appeal is based. You might include further proof of nonprofit status or a more comprehensive description of your organization's activities during the past 12 months if these were factors in the earlier decision denying the application.

### 3-1.7.3 Final Decision

After reviewing any additional information, the Nonprofit Service Center may reverse its decision and approve the application. Otherwise, your appeal and supporting documentation are sent to the manager of Business Mail Acceptance at U.S. Postal Service Headquarters (Washington, DC 20260-6808), who may ask for further evidence of qualification. The manager issues the final agency decision.

## 3-2 ADDITIONAL MAILING OFFICES

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### 3-2.1 General

If your organization is already authorized to mail at the Nonprofit Standard Mail rates at one post office, you may request authorization to mail eligible material at another post office without going through the original application process.

### 3-2.2 Applying for Authorization

#### 3-2.2.1 PS Form 3623

You may request to mail at an additional post office by filing PS Form 3623, *Application for Nonprofit Standard Mail Rates at Additional Mailing Office*, with the postmaster at the post office that your organization intends to use as the additional mailing office. (Appendix E contains a copy of PS Form 3623 for your convenience.)

You must show on this application the exact organization name as originally approved. (If your organization's name has changed, include the official documentation substantiating the change.) If you include your organization's original authorization number on PS Form 3623, the postmaster can request the additional authorization by telephoning the Nonprofit Service Center.

#### 3-2.2.2 Letter of Request

You must attach to PS Form 3623 a letter on your organization's letterhead, signed by a responsible official of the organization, requesting authorization to mail at the additional mailing office. You should allow 30 days for the processing of your request.

#### 3-2.2.3 Mailing While Application Pending

Your organization may not mail at the Nonprofit Standard Mail rates at the additional mailing office before the application is approved, although you may use regular Standard Mail (A) or First-Class rates. The deposit arrangements described in 3-1.6.3 also apply to additional mailing office applications. No refund is made on mailings entered at First-Class rates.

## 3-3 MAILING AFTER AUTHORIZATION RECEIVED

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### 3-3.1 Mailing Frequency

To retain each authorization, you must make at least one bulk mailing during a 2-year period at the original mailing office and one bulk mailing at each additional mailing office, if applicable.

### 3-3.2 **Revoked Authorizations**

If your organization's authorization to mail at the Nonprofit Standard Mail rates is revoked at the post office where the original application was approved, the authorization at each additional mailing office is also revoked. If an authorization is revoked at an additional mailing office, that revocation does not affect the status of authorizations at the original office of mailing or any other additional mailing office.

### 3-3.3 **Changing Mailing Locations**

If your organization wishes to change its original office of mailing, you must submit a new application on PS Form 3624 to the post office intended to be the new original office of mailing. You must then go through the full application process described in 3-1 to obtain an authorization to mail at the Nonprofit Standard Mail rates.

If your organization changes printers or mailing agents and requires a new additional mailing office authorization, follow the procedures in 3-2 to obtain the authorization. You may not transfer your organization's authorizations between post offices.