Earned Value Incentive Program

User Guide

February 12, 2013

Version: 2.1

Document Change History

This is the second version (2.1) of the Earned Value Incentive Program User Guide.

Section	Title	Description
All	Earned Value Incentive User Guide	Initial Draft
All	Earned Value Incentive User Guide	Reviewed/Edited v1.0 of draft
Section 5 Reporting – Activity Report, pg. 23	Earned Value Incentive User Guide	Notes added for Total CRM Adjustment & Total BRM Adjustment
Section 4 Enroll – Payment Accounts, pg. 17	Earned Value Incentive User Guide	Updated Payment Accounts to include Custom MSP Permit Search
Section 1.1 Additional Assistance, pg. 4; Section 3 – Identify Yourself, pg. 9	Earned Value Incentive User Guide	Updated Additional Assistance; Identify Yourself based on business feedback
Section 8	Earned Value Incentive User Guide	Added scenarios for MSP and mail owner enrollment.

Table of Contents

1 Introduction

This guide will help you to register for the Incentive Programs Service which is a prerequisite for participation in any incentive program. This guide will also help you enroll for the Earned Value (EV) incentive program. The initial registration for the service, though it takes several steps, must only be completed once and allows enrollment for all incentive programs that may be active at a certain time. Begin your enrollment by completing the steps listed in this guide.

Finding additional Information

The following documentation may also be useful and provide up to date information.

- Promotions and Incentive Programs documentation on RIBBS
  https://ribbs.usps.gov/mobilebarcode/current.htm
- April 2012 Release 31 Postal Service Technical Specifications
  https://ribbs.usps.gov/intelligentmail_schedule/documents/tech_guides/april2012/techspecs.htm
- April 2012 *PostalOne!* Release Notes
  https://ribbs.usps.gov/intelligentmail_schedule/documents/tech_guides/april2012/releasenotes.htm
- Incentive Programs Service User Guide (for Mail Owners)
  https://ribbs.usps.gov/mobilebarcode/general.htm
- Business Customer Gateway User Access Guides
  https://ribbs.usps.gov/intelligentmail_guides/documents/tech_guides/user_access/user_access.htm

1.1 Additional Assistance

For Business Customer Gateway enrollment assistance contact the *PostalOne!* Customer Care Center at (800) 522-9085 or postalone@email.usps.gov.

Promotion related questions can be directed to the Earned Value Program Office at: earnedvalue@usps.gov .

1.2 Document Conventions

For further information, icons navigate you to the Troubleshooting and FAQ sections of this guide by the Ctrl + click feature.

1.3 Key Terminology

Business Customer Gateway (BCG): Web portal for **USPS®** business services http://gateway.usps.com

Customer Registration ID (CRID): A unique ID for a company name and location combination. The CRID is automatically assigned when you select a Business Account.

Business Service Administrator (BSA): An individual that can approve or deny a user's access to participate in services on behalf of a company. The first person to request access to a service from your company will be prompted to become the BSA. In order to gain access to the service someone must assume the BSA role.

2 New Business Customer Gateway (BCG) Users

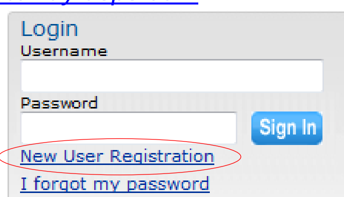
If you have never used the Business Customer Gateway, you must create a new business account.

1	2
Create Account	Complete Existing User section

1

Create Account

1.1 Navigate to the [BCG](gateway.usps.com) and click on 'New User Registration'. The Business Customer Gateway URL is gateway.usps.com.



1.2 Follow the prompts by entering the required fields to create a new business account. You will receive an automatic email confirming that Your United States Postal Service Online Business Account has been activated. TIP: When initially establishing your username and password for a business account, you can enter an existing CRID in the CRID input field. Use this "known" CRID to ensure access to the intended service for a particular location.

2

Follow steps for Existing BCG Users

2.1 Go to the Existing BCG Users section and follow those same steps.

3 Steps for Existing Business Customer Gateway (BCG) Users

If you are already using the BCG, complete the four steps to enroll for an incentive program:

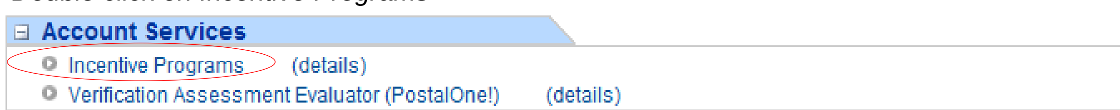
1	2	3	4
Request Incentive Programs	**Request Manage Mailing Activity** (if needed)	**Identify Yourself**	**Enroll**

1 Request Incentive Programs

1.1 Navigate to the BCG and sign in.

1.2 Double click the Request Access link at the top of the page

1.3 Double click on Incentive Programs



1.4 Verify all your Business Locations

Click on Add Location button to add additional locations if they are not displayed.

Note: When adding locations, enter the CRID if you know it. Otherwise enter the company and address information to get access to existing locations.

1.5 Select all your Business Locations

Click the check box for all business locations that you would like to enroll and then click the Next > button.

1.6 Confirm your selection

Verify the accuracy of your locations and click the Confirm button.

Note: It may save time to write down the CRIDs of any newly added locations

1.7 Become the Business Services Administrator (BSA) role for Incentive Programs

The Incentive Programs BSA for each location must approve all requests from other users to enroll the location to the service. As a result, there must be an Incentive Programs BSA for each location in order to complete enrollment. The individual who assumes the role will approve or deny who can access the incentive programs module on your company's behalf and which locations will be available for enrollment in the Incentive Programs. To assume the BSA role, complete the following steps:

→ Review the USPS Online Agreement.
→ Select the checkbox to agree to the USPS Online Agreement.
→ Select the checkbox of the location(s) for which you want to become BSA.
→ Click on the Yes button.

Note: Write down the CRIDs of your business locations; you may need them for Step 2. You will receive an automatic email that the request for Incentive Programs and business location has been approved.

1.7.1 You are the BSA for Incentive Programs

If you see the message shown below (Figure 1), skip step 1.7.2 and go to 2 **Select an Incentive Program.**

Figure 1 – BSA Access Granted

If you do not see the message from above (Figure 1), continue with step 1.7.2 to get access to the Manage Mailing Activity service. Go to Step 2 below to become the BSA for Manage Mailing Activity.

1.7.2 You need approval from the BSA for Manage Mailing Activity

If you see the message shown below (Figure 2), go to step 2: **Request Manage Mailing Activity** and follow all the steps. If you would like more information about why this step may be necessary, see items (1) and (2) of the FAQ sheet.

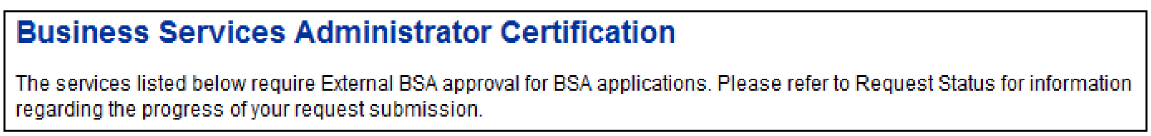
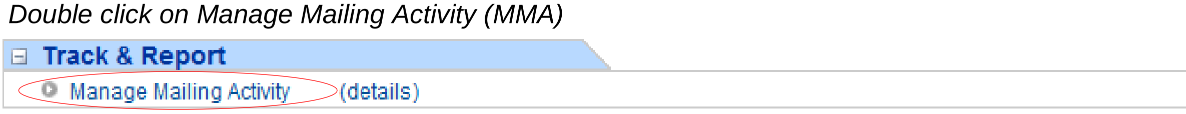


Figure 2 – BSA Certification Required

2 Request Manage Mailing Activity (if needed)

2.1 If you do not already have access to the Manage Mailing Activity, double click the Request Access link at the top of the page. If you have access to Manage Mailing Activity, skip to Step 3.

2.2 Double click on Manage Mailing Activity (MMA)



2.3 Repeat Steps 1.4, 1.5 and 1.6 above to request access to MMA

If you added new locations while at step 1.4 in **1** , enter all of them here as well. Use the **Add Location** button to either enter the CRIDs of those existing locations or the exact company name and addresses as entered in 1.4.

2.4 Become the BSA for Manage Mailing Activity

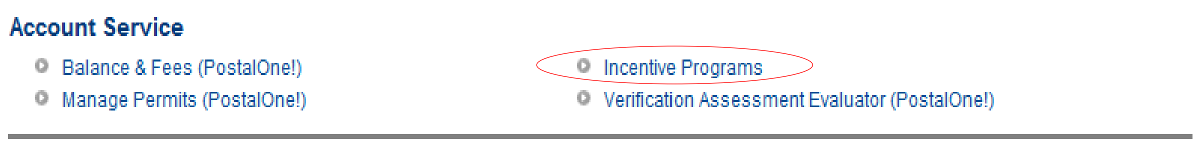
There must be a BSA in place before you can enroll your business locations to Manage Mailing Activity. To become the BSA, complete the following steps:

→ Review the USPS Online Agreement.
→ Select the checkbox to agree to the USPS Online Agreement.
→ Select the checkbox of the location(s) for which you want to become BSA.
→ Click on the **Yes** button.

You are now the Manage Mailing Activity BSA for the selected locations. The locations you have selected have been enrolled for the Manage Mailing Activity service. You will receive an automatic email that the request to become the BSA for Manage Mailing Activity and business location(s) has been approved.

3 Identify Yourself

From the BCG home page, select Incentive Programs under the Account Service category.



1. Identify whether you are a Mail Owner or Mail Service Provider

Correctly identifying yourself is important for several reasons. Select Mail Owner if you plan to prepare and tender your own mail to the USPS when claiming the incentive. Select Mail Service Provider if you are a mailing agent for mail owners. Refer to Figure 3.

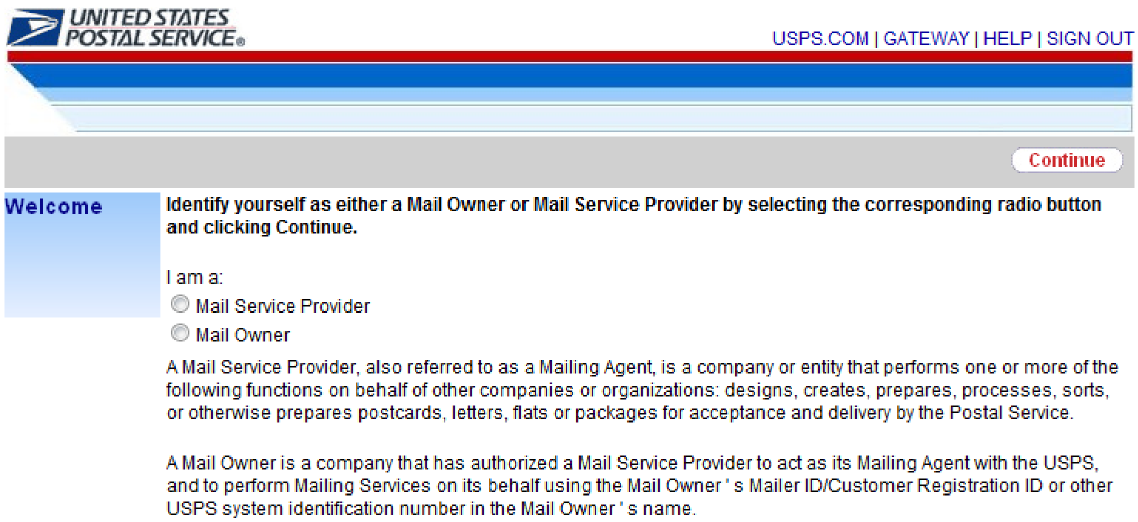


Figure 3: Mail Owner or Mail Service Provider identification

2. *Verify your mailer identity*

   Select the *double-arrow* button >> to expand a pop-up that displays your user's profile information. Use it to verify that you have identified yourself correctly. Refer to Figure 4.

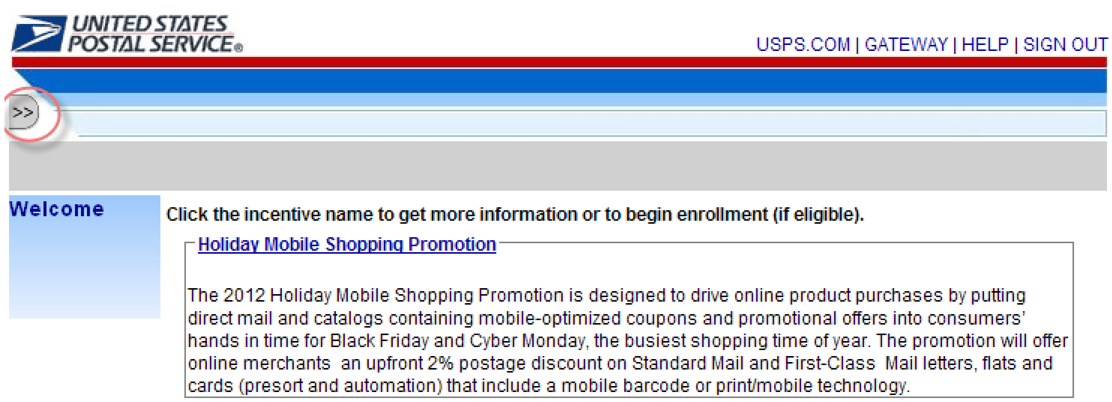


Figure 4: The double-arrow button. When you click the button, a pop-up will display which provides User Profile Information. See Figure 4a.

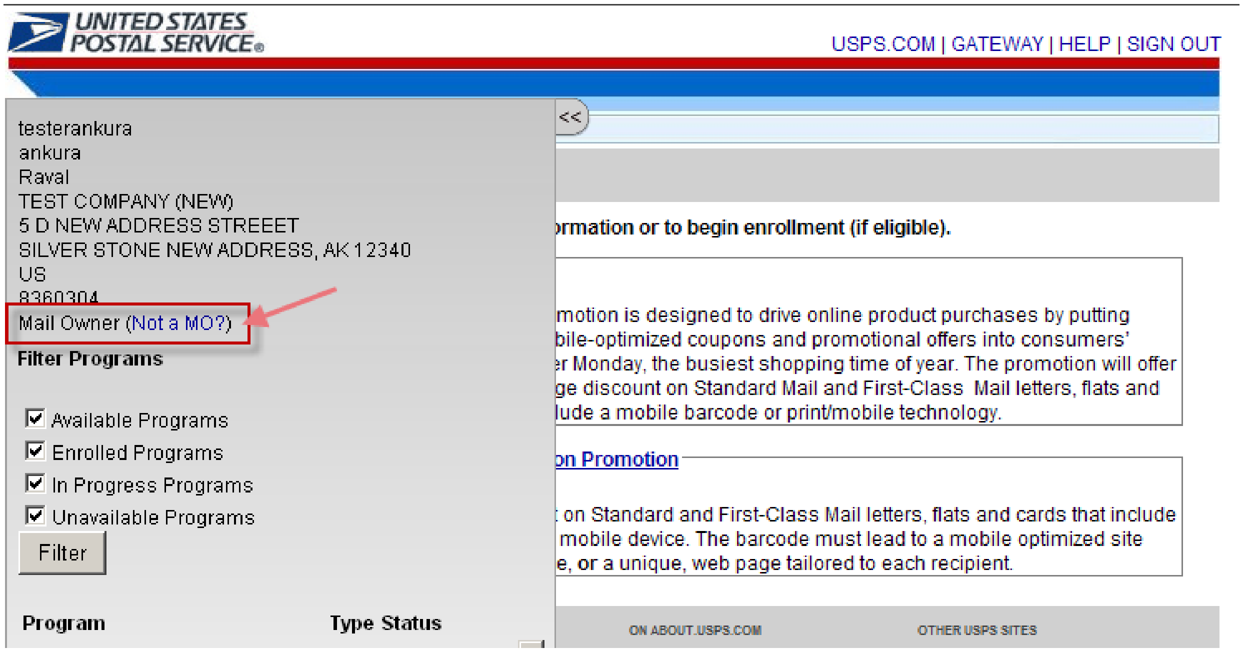


Figure 4a: The User Profile Information pop-up. Note that the user is identified as a Mail Owner. Click the double-arrow to close the pop-up window.

It is important that you verify that you have correctly identified yourself. To do this, look at the identity label displayed in the pop-up right above the Process Start Date. In the example from Figure 4b below, the user has identified himself as a “Mail Service Provider”.

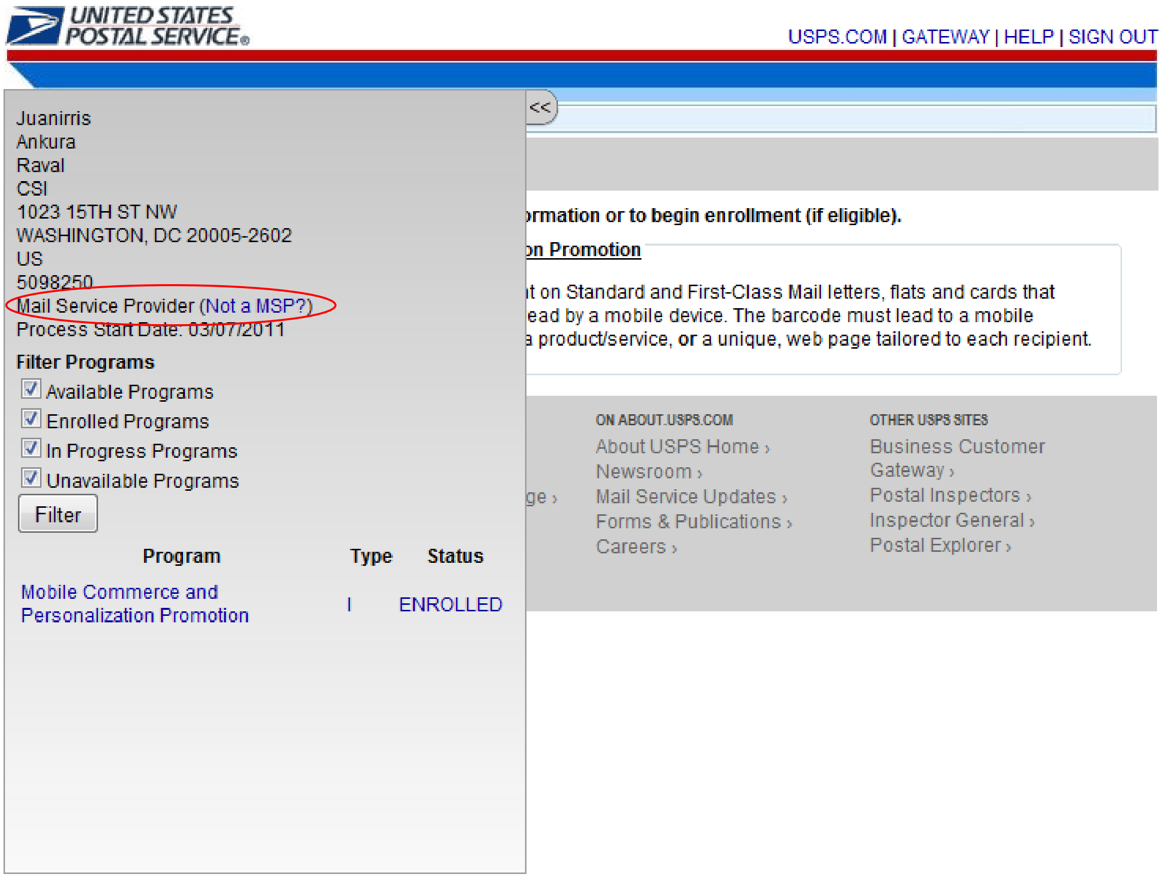


Figure 4b: The User Profile Information pop-up. The pop-up window displays enrollment information and the identity of Mail Owner or Mail Service Provider. Note that the user's profile shows that the user is a Mail Service Provider. Click the double-arrow to close the pop-up window.

If you need to change your identity, use the link that is next to the identity label. In Figure 4b, the link reads "Not a MSP?" in parenthesis. Select this link and you will be directed back to the *Identify Yourself* screen where you can modify your selection.

Modifying your identity after you are enrolling/enrolled in a program will reset the enrollment process and you will need to re-enroll if you wish to continue claiming the Earned Value credit. Your status will revert back to "AVAILABLE".

4 Enroll

1. Begin Enrollment

a. Select an Incentive Program

Select the *Earned Value Incentive Program* (as a MSP or Mail Owner) by clicking on the program name. Refer to Figure 5.

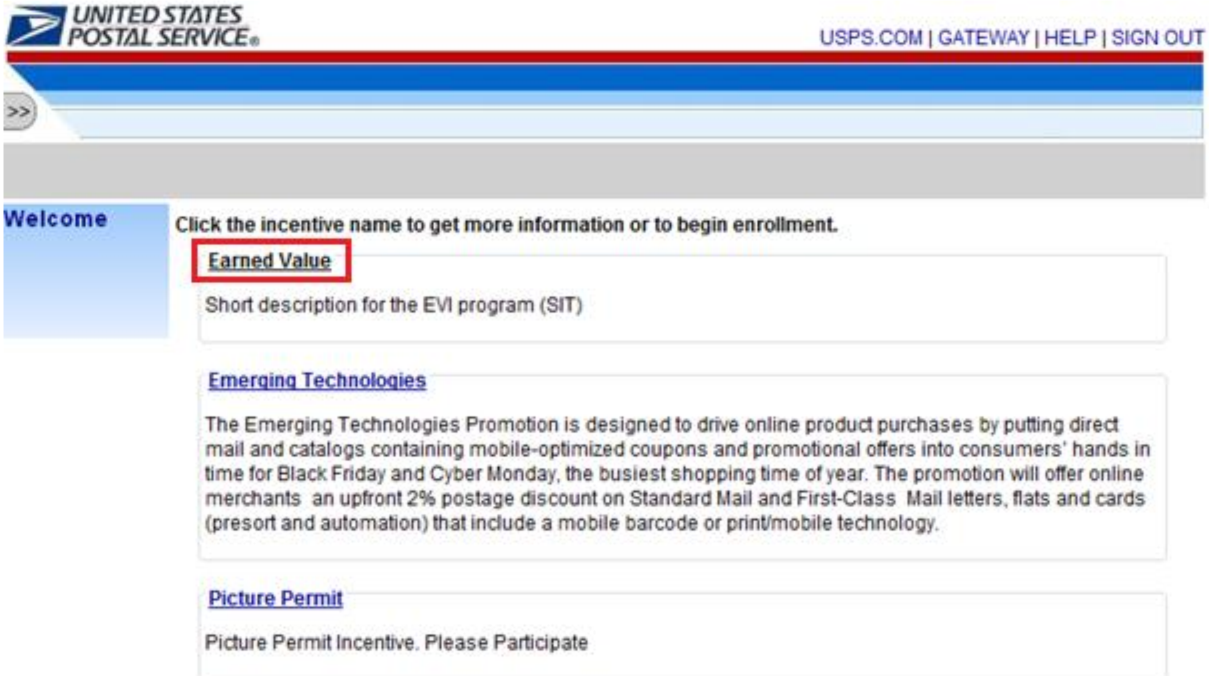


Figure 5: Incentive Program Selection

b. Select the Begin Enrollment button

To begin enrollment into the selected Incentive Program, select the **Begin Enrollment** button located at the top right corner of the page.

c. Follow the Enrollment Tasks

Complete the Enrollment tasks by using the tabs located on the left-hand side of the page, or by clicking the links associated with each step. As you complete each task, the system will display the task as "Complete". Some Enrollment tasks become available only after other tasks have been completed. Refer to Figure 6.

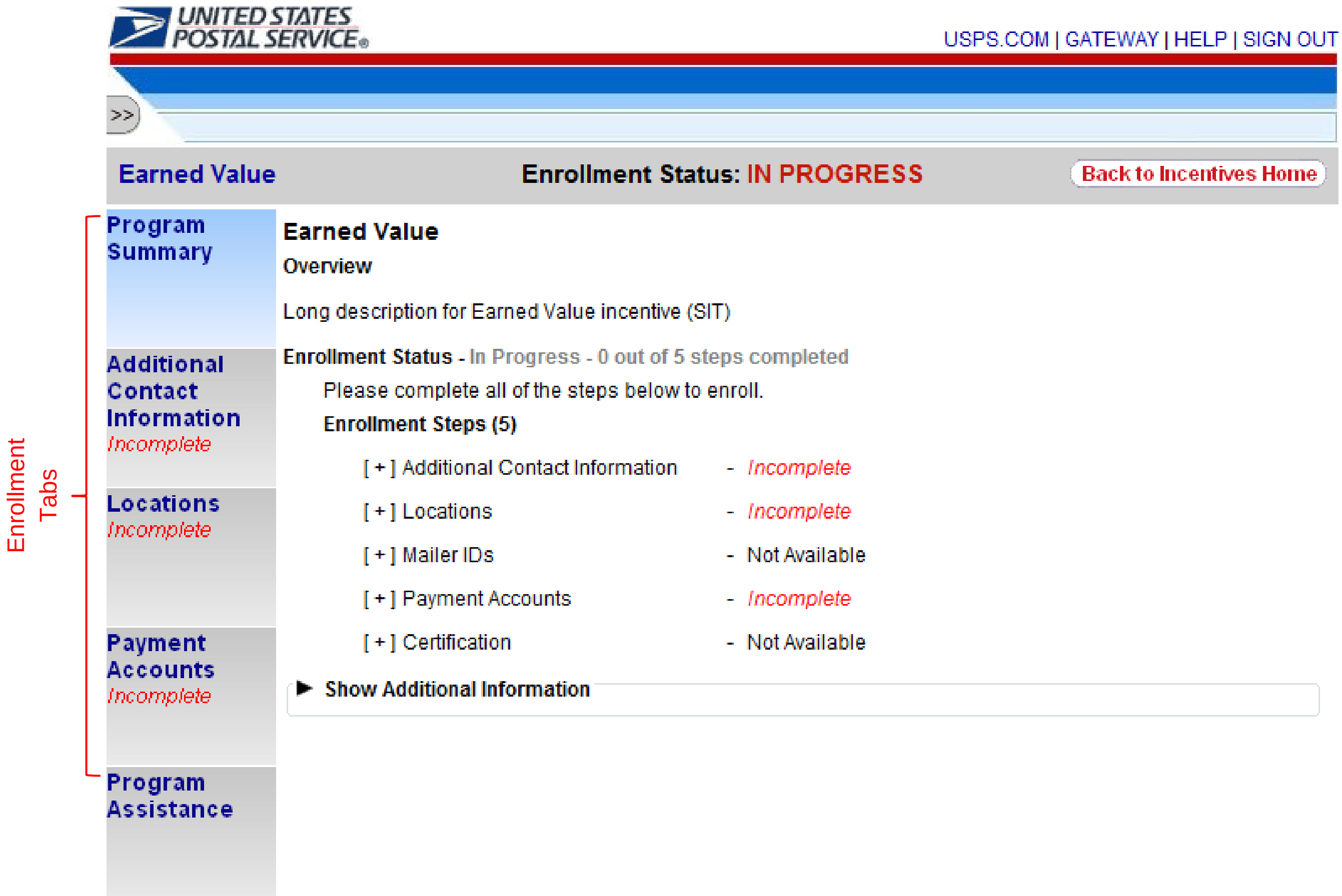


Figure 6: Enrollment Status: In Progress.

2. Additional Contact Information Tab

The Additional Contact Information tab allows you to save contact information for an alternative primary contact and for a technical contact. You are required to enter information for the alternative primary contact to complete this task.

3. Locations Tab

The Locations tab allows you to review your participating mailing locations. You must verify the accuracy of the displayed locations and select the <I Agree> button to complete this task.

Post-Enrollment Changes

If you associate new locations to the Incentive Programs service after you have completed enrollment in a program, these locations will not be automatically enrolled in the program. To enroll these new locations in the programs for which you are already enrolled, you must select the Incentive Programs link as described in section 3.

You will want to enroll all CRIDs/locations for which there are eligible Mailer IDs you plan to use for the promotion. If CRIDs are missing, the Mailer IDs associated to these CRIDs will not be enrolled in the program and you will not receive any credit for CRM/BRM volume associated to them. The system will NOT recognize the Mailer IDs as enrolled and will NOT track their volume.

Unavailable Company Locations

Shared business locations may be Unavailable for enrollment to you when they have already been enrolled by another user. A business location is referred to as shared when it has been registered for the Incentive Program's service by multiple users. See Figure 7.

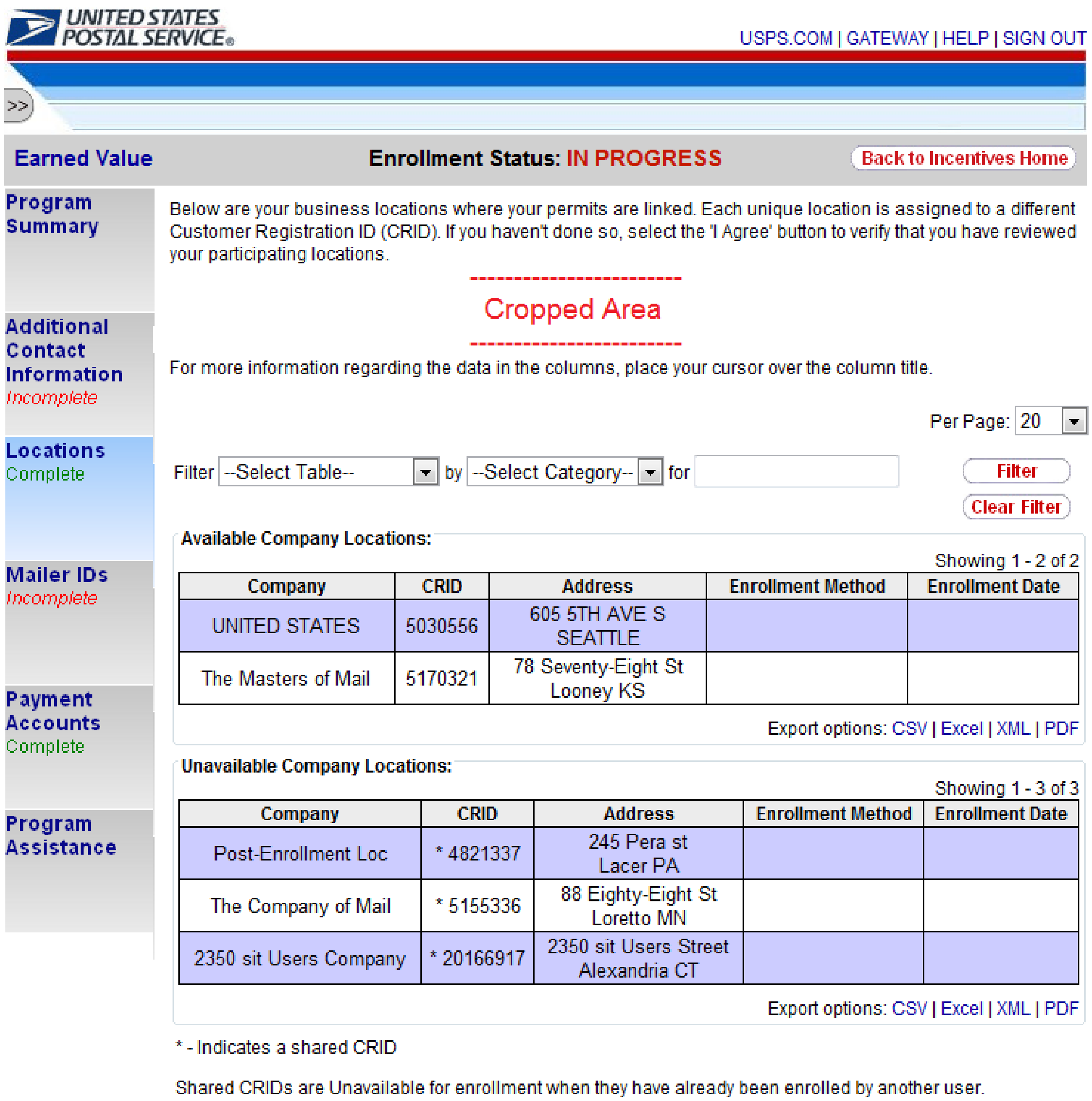


Figure 7: Unavailable Company Locations. The logged-in user shares some of their locations with another user who is already enrolled in the program.

4. Mailer IDs Tab

The Mailer IDs tab will only become available once the Locations tab has been completed. It allows you to review your participating mailer IDs. You must verify the accuracy and completeness of the mailer IDs and select the <I Agree> button to complete this task.

Note that you will need to enroll all CRIDs/locations for which there are eligible Mailer IDs that you plan to use for the promotion**.** Only business locations that are registered for the Incentive Program's service will have their associated Mailer IDs displayed in the Mailer IDs tab.

Unavailable Mailer IDs

Shared Mailer IDs may be Unavailable for enrollment to you when they have already been enrolled by another user. A Mailer ID is referred to as shared when its parent CRID (i.e. the CRID to which it belongs to) has been registered for the Incentive Program's service by multiple users. See Figure 8 and Figure 8a.

Adding a Mailer ID post-agreement

If a Mailer ID is added to one of your participating CRIDs after you have already agreed to the list presented in the Mailer IDs tab and you want it to participate in the program, you must refresh your list of MIDs. To do this, you must return to the MIDs tab and follow the steps indicated on the page.

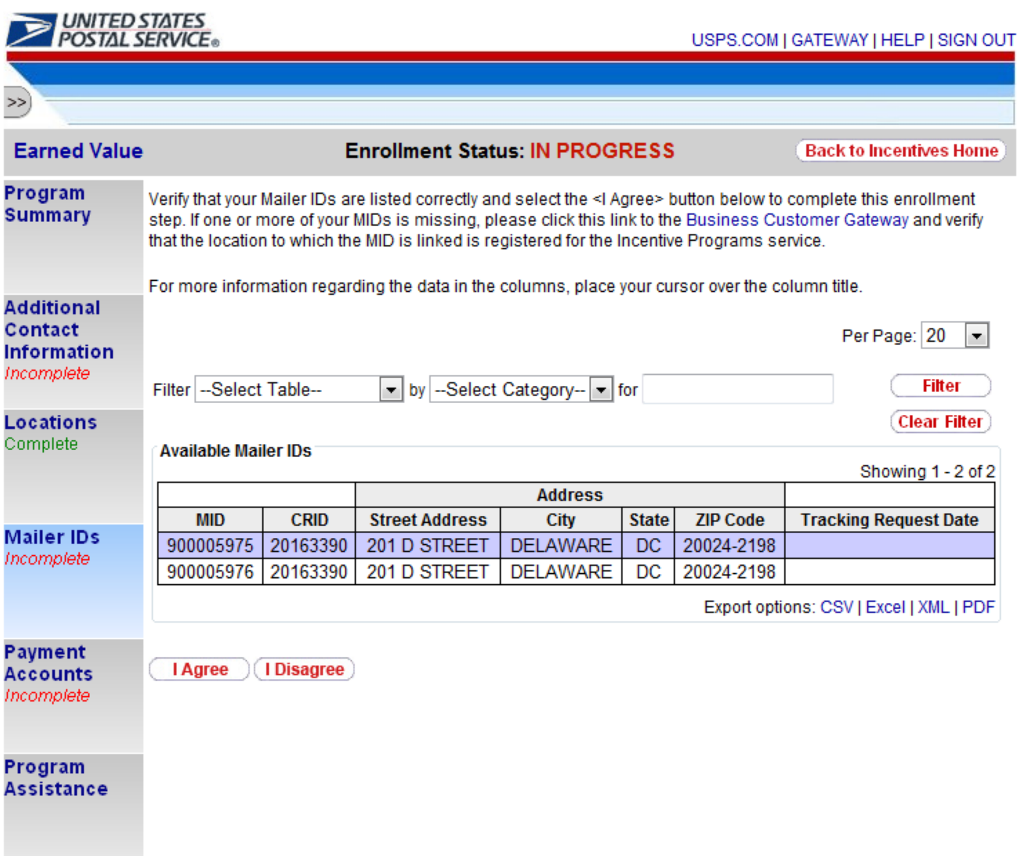


Figure 8: Mailer IDs tab. This user does not share any of his business locations. Therefore, all the Mailer IDs tied to his locations are Available for enrollment to him.

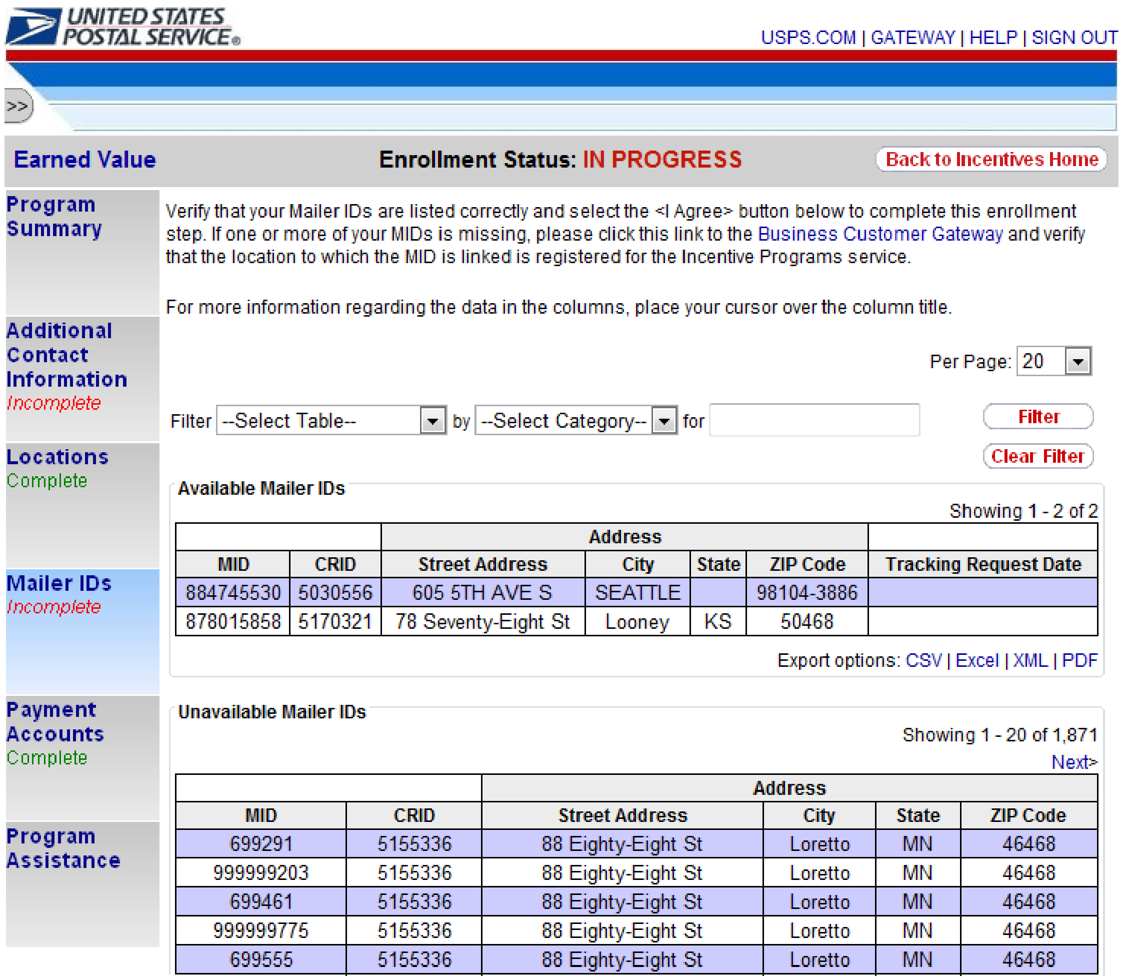


Figure 8a: Mailer IDs tab. This user shares some of his business locations. The Unavailable Mailer IDs are those that belong to shared locations that have already been enrolled by another user.

5. Payment Accounts Tab

The Payment Accounts tab allows you to review the permits that are associated to your registered business locations. You must verify the accuracy and completeness of the permits and select the one that you want to use as your credit destination account. Once you have made your selection, click on the <I Agree> button to complete this task.

In order to use the credit accrued during the program, you will have to use your selected permit to pay for postage when claiming the incentive in the postage statement.

Changing my selected permit – Eligible Permits

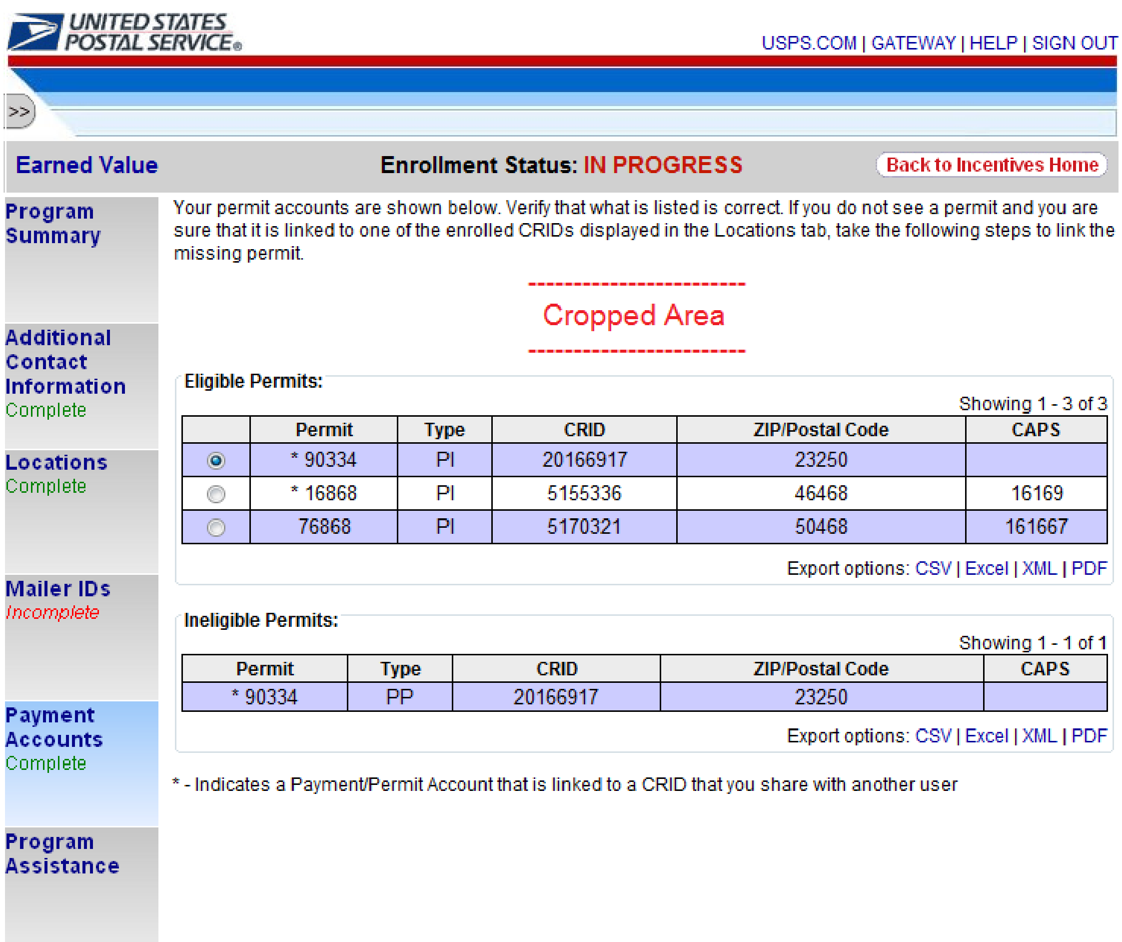
You can change the selected permit at any time up to the start of the Award Claim Period. Once the Award Claim Period has started, the selection is sent to PostalOne! and cannot be changed.

Ineligible Permits

Based on the permit types allowed by the incentive program, your permits will be sorted as eligible or ineligible as shown in Figure 9 below. For the Earned Value Incentive Program, the only eligible permits are Metered (MT), Precanceled (PC), Permit Imprint (PI), OMAS Imprint (OI), and OMAS Metered (OM).

Adding a new permit

If a permit is added to one of your participating CRIDs, you have to wait 30 minutes for the new permit to display on the page.



	Permit	Type	CRID	ZIP/Postal Code	CAPS
◉	* 90334	PI	20166917	23250	
○	* 16868	PI	5155336	46468	16169
○	76868	PI	5170321	50468	161667

Permit	Type	CRID	ZIP/Postal Code	CAPS
* 90334	PP	20166917	23250	

Figure 9: Payment Accounts tab. This user has three eligible permits (i.e. Permit Imprint (PI)) and one ineligible permit (i.e. not PI).

Custom MSP Permit Search

The Custom MSP Permit Search is only available to Mail Owners in order to search for and retrieve MSP permits the credit will be applied to. A MSP permit can be selected up until the start of the Award Claim Period (as determined on the internal console). The Permit Number, Permit Type, and State Code are denoted as required fields; the City is optional for the user to enter. Figure 9a.

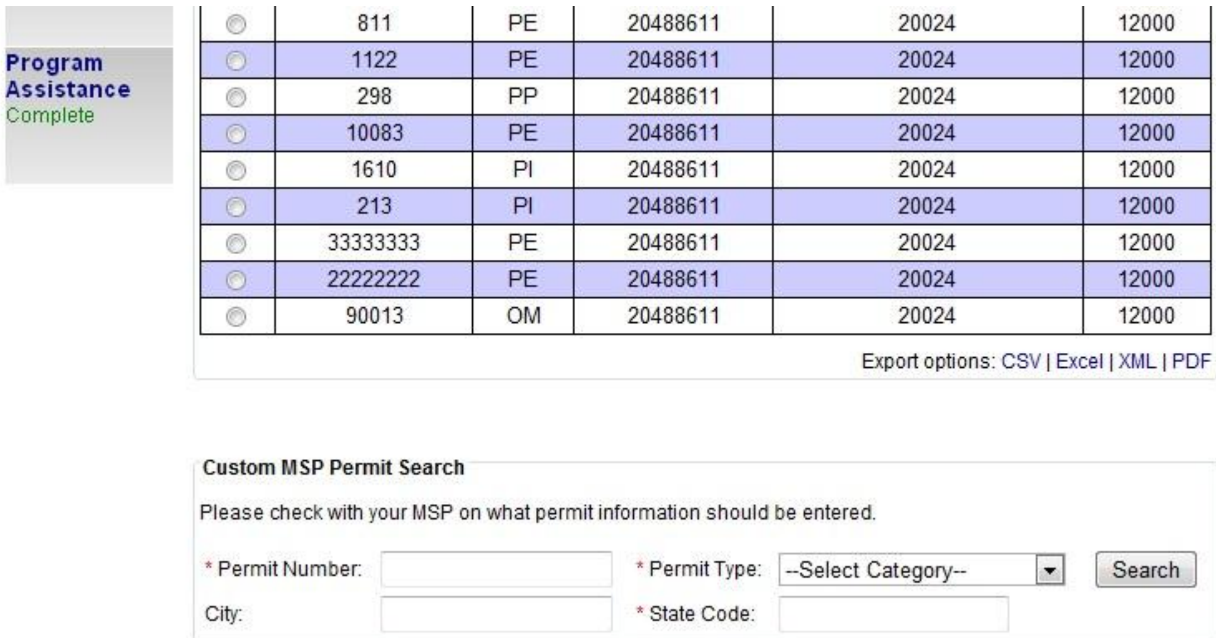


Figure 9a: Payment Accounts tab – Custom MSP Permit Search

Once a MSP Permit is searched for, a “Select MSP Permit” pop-up will display the Permit Number, Permit Type, Finance Number, City, State, CRID, Business Name, and Address of the company. The user can select which MSP Permit will receive the credit by clicking <Save>. Then the pop-up window will close and the MSP Permit table will be populated with your selection on the Payment Accounts screen with the following fields: Permit Number, Permit Type, CRID, ZIP/Postal Code, and CAPS info. Figures 9b and 9c below.

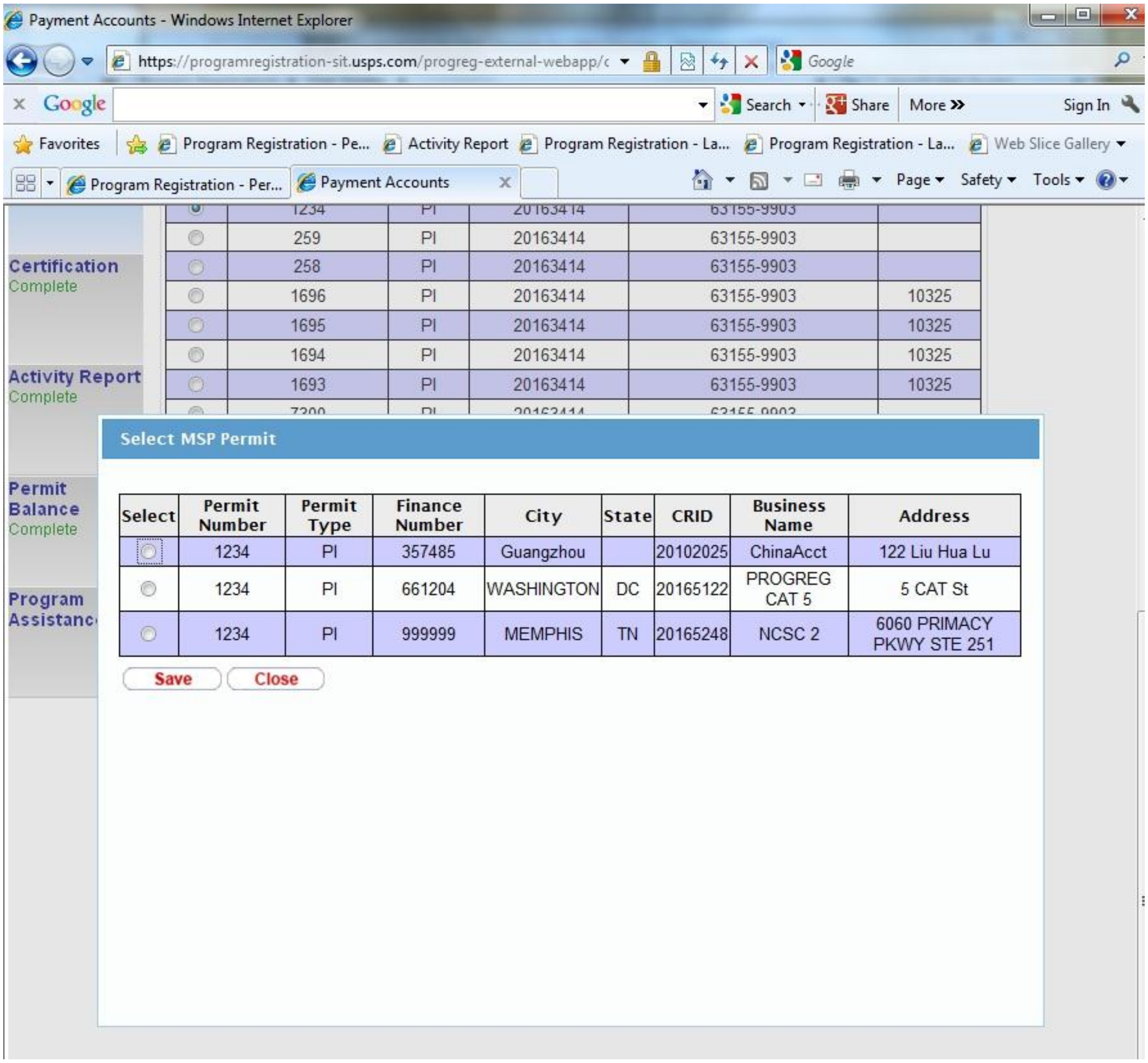


Figure 9b: Payment Accounts tab – Custom MSP Permit Search – Select MSP Permit pop-up window for the user to select which permit to receive credit on.

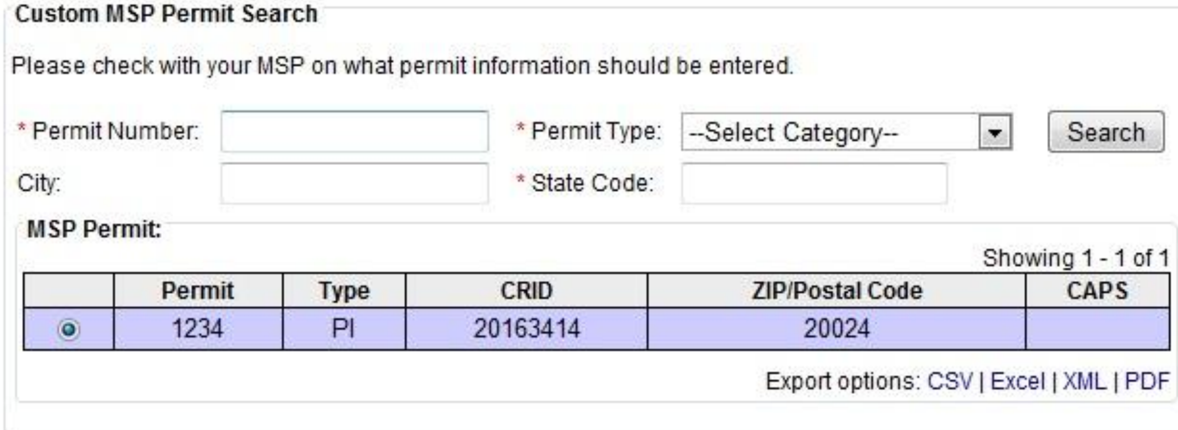


Figure 9c: Payment Accounts tab – Custom MSP Permit Search – MSP Permit that was selected by user.

6. Certification Tab

The Certification tab becomes available once the preceding steps have been completed. You must agree to the Certification Agreement by selecting the <I Agree> button to complete this final enrollment step. Upon agreeing, you are enrolled into the Incentive Program. You will know that you are fully enrolled when you see the Enrollment Status change to “Enrolled”. Refer to Figure 10.

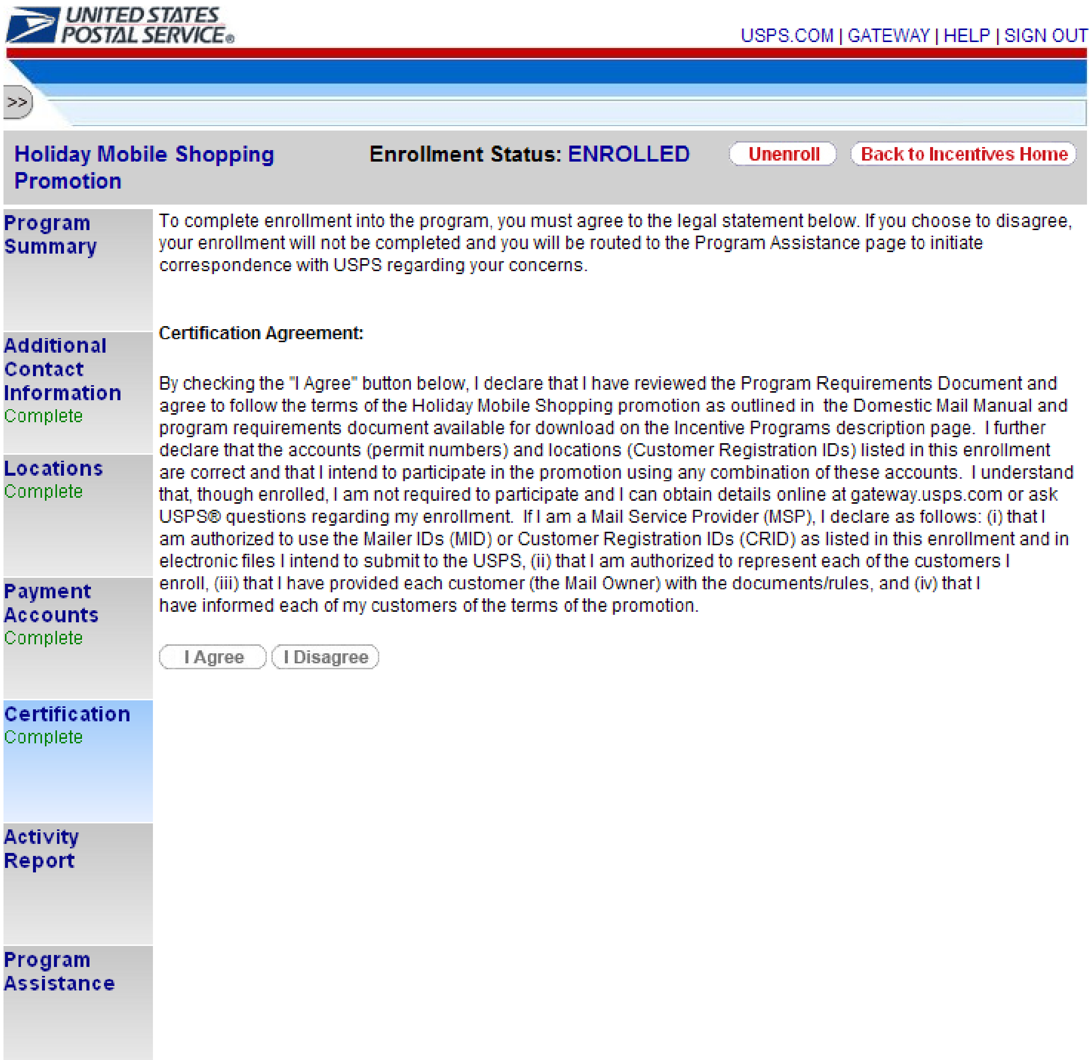


Figure 10: Certification tab. User has agreed to the certification and Enrollment Status changes to "ENROLLED".

4 Post-enrollment Scenarios

If you have completely enrolled in a program and later want to enroll a CRID; or request that a new Mailer ID be tracked; or add a new permit to the Incentive Program's service in the Business Customer Gateway (BCG), you may need to take a few manual steps to activate them. Refer to the post-enrollment information below.

Adding a Location post-enrollment

If a new location is granted access to the Incentive Programs Service in the BCG and you plan to populate the Permit Holder's Permit field of the eDoc with a permit linked to this location, you must refresh your list of enrolled CRIDs for the program. To do this, you must return to your homepage and select the Incentive Program's link (as described in Section 3, item 1.3).

Adding a Permit post-enrollment

If a permit is added to one of your participating CRIDs after you have completely enrolled in the program and you plan to go back and select this permit as your credit destination account, you must wait 30 minutes for the new permit to display on the page.

Adding a Mailer ID post-enrollment

If a Mailer ID is added to one of your participating CRIDs after you have completely enrolled in the program and you would like that MID to participate in the program, you must refresh your list of MIDs. To do this, you must return to the MIDs tab and follow the steps indicated on the page.

5 Reporting

Once completely enrolled, the Activity Report tab and Permit Balance tab will display below the Certification tab.

The Activity Report section provides both a high-level and a detailed view of volume and earned credit from returned Business Reply Mail (BRM) and Courtesy Reply Mail (CRM) pieces. It lets you know where your earned credit is coming from.

The Permit Balance section provides both a high-level and a detailed view of your credit usage as it gets used up to pay mailings. It lets you track the history of your earned credit by providing detailed information such as the amount of credit used per postage statement and the remaining balance.

Activity Report

The top section of the Activity Report, Earned Value Summary, displays the aggregate CRM Volume, BRM Volume, and Total Award Amount. Information is refreshed nightly to reflect data updates from the previous day. Refer to Figure 11.

Total Volumes for each piece type (i.e., BRM or CRM) are obtained by adding up the tracked volumes across all your participating Mailer IDs. The Award Amount is computed based on the Total Volume which is obtained by adding up Total CRM Volume multiplied by the CRM Credit Per Piece and Total BRM Volume multiplied by the BRM Credit Per Piece. [Note: The credit per piece for BRM and CRM were setup on the Incentive Configuration tab on the internal console]

As a mailer, you can see how your earned Award Amount grows as more and more returned pieces are scanned and entered into the system.

The *Other Credit* field will only be populated if other mailers from your company enrolled in the program and selected the same permit as you for their award destination account. The Other Credit field displays the total award amount earned by these mailers. Note that all mailers who are authorized to use a permit could use the credit associated to it once it has been released by the Program Office.

Earned Value Summary

Total available credit will be applied to:
Permit Number: 315590
Permit Type: PE
Finance Number: 513096

Award Start Date	Award End Date	Total Volume CRM	Total Volume BRM	Award Amount
06-01-2012	10-31-2012	1,196	11,236	$1,757.80
	Subtotal	**1,196**	**11,236**	**$1,757.80**
	Adjustment	**10**	**60**	**$13.00**
	Grand Total	**1,206**	**11,296**	**$1,770.80**
			Other Credit *	**$7,279.00**
			Total Available Credit	**$9,049.80**

* Credit belongs to other users

Figure 11: Earned Value Summary

The bottom section, Earned Value Detail Report, provides a detailed view by Mailer ID (MID). Each row represents a different MID for which it displays the total returned volume broken down into CRM and BRM pieces by month. Refer to Figure 12.

Read the content that follows for a more complete description of the information displayed in the Earned Value Detail Report section.

Earned Value Detail Report

CRID	Company	MID	JUN 2012		JUL 2012		AUG 2012	
			CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces
20400413	Company A	900008256					148	448
20499224	Company B	900008303		296		1,359		2,371

SEP 2012		OCT 2012		Total CRM	Total BRM	Total CRM Adjustment	Total BRM Adjustment	Net CRM	Net BRM	Credit Amount for CRM	Credit Amount for BRM
CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces								
1,048	2,048		3,448	1,196	5,944	-20	0	1,176	5,944	$1,176.00	$297.20
	202		1,064	0	5,292	30	60	30	5,352	$30.00	$267.60

Figure 12: Earned Value Detail Report

CRID: The Customer Registration ID for the business location associated to each of the tracked Mailer IDs.

Company: The company name associated to the business location identified by the CRID.

MID: The Mailer ID that was tracked to obtain the CRM and BRM volumes.

CRM Pieces: The number of returned Courtesy Reply Mail (CRM) pieces as of the current date for the corresponding month, before adjustments.

BRM Pieces: The number of returned Business Reply Mail (BRM) pieces as of the current date for the corresponding month, before adjustments.

Total CRM: The total number of returned Courtesy Reply Mail (CRM) pieces as of the current date, before adjustments.

Total BRM: The total number of returned Business Reply Mail (BRM) pieces as of the current date, before adjustments.

Total CRM Adjustment: The total adjustment, in number of pieces, of returned Courtesy Reply Mail (CRM). An adjustment may occur if there is an error in the number of pieces scanned.

Total BRM Adjustment: The total adjustment, in number of pieces, of returned Business Reply Mail (BRM). An adjustment may occur if there is an error in the number of pieces scanned.

Net CRM: The total number of returned Courtesy Reply Mail (CRM) pieces as of the current date, after adjustments.

Net BRM: The total number of returned Business Reply Mail (BRM) pieces as of the current date, after adjustments.

Credit Amount for CRM: The total award amount earned from the adjusted volume of returned Courtesy Reply Mail (CRM) pieces as of the current date.

Credit Amount for BRM: The total award amount earned from the adjusted volume of returned Business Reply Mail (BRM) pieces as of the current date.

Action Buttons:

I Agree: Click on I agree, if you agree with the volume and credit received.

I Disagree: Click on I disagree, if there are discrepancies that can be validated by the mailer. Please enter valid reason and appropriate documentation via program assistance so that the program office can review and resolve your discrepancy.

Permit Balance

The top section of the Permit Balance report, the Permit Balance Summary, displays a high-level view of your credit usage by mail class. Information is refreshed nightly to reflect data updates from the previous day.

This view lets you track the history of your credit's usage. It provides high-level information such as the amount of credit used per mail class, the number of postage statements per mail class on which the credit was used, and the remaining credit balance. Refer to Figure 13.

As a mailer, you can see how your earned credit gets used as you claim the incentive by populating the promotion code in your eDoc submissions.

Permit Balance Summary

					First Class		Standard Mail		Non-Profit			
Company Name	Permit Number	Permit Type	Finance Number	Credit Acquired	Credit Used	Number Of Postage Statements	Credit Used	Number Of Postage Statements	Credit Used	Number Of Postage Statements	Credit Balance	Date and Time Credit Released
Company A	315590	PE	513096	$1,770.80	-$71.76	12	-$167.44	28	$.00	0	$1,531.60	12/08/2011

Figure 13: Permit Balance Summary table.

Read the content that follows for a more complete description of the information displayed in the Earned Value Detail Report section.

Company Name: The company name associated to your primary affiliation location.

Permit Number, Permit Type, and Finance Number: These 3 data elements uniquely identify the permit account that you designated as the destination account for your earned credit.

Credit Acquired: The total amount of earned credit that was destined to the selected permit. This amount could proceed from multiple users and might not reflect exclusively the individual contribution of your registered Mailer IDs.

Credit Used: The amount of credit that has been used up by you, per mail class, as of the current date.

Number of Postage Statements: The number of postage statements, per mail class, on which the credit was used by you.

Credit Balance: The amount of credit remaining on the permit. It takes into account the amount used up by other users, when applicable.

Date and Time Released: The date and time of when the credit acquired was released to the system in charge of postage statement processing. It is then ready to be used.

The bottom section, the Permit Balance Detail, provides a detailed view of your credit usage broken down by each individual Postage Statement. It lets you track the history of your credit usage giving you detailed information such as the amount of credit used per postage statement, the date when it was used, and the Postage Statement Sequence Number. Refer to Figure 14.

Permit Balance Detail

Mailing Date	Postage Statement Seq Number	Mail Class	Total Adjusted Postage	Total Pieces	Incentive Amount
12/12/2012	5200438	SM	$159,154.14	650,105	-$5.98
12/12/2012	5200439	SM	$70,805.94	300,109	-$5.98
12/12/2012	5205457	SM	$.40	1	-$5.98
12/12/2012	5205475	FC	$34.87	94	-$5.98
12/12/2012	5205480	FC	$34.87	94	-$5.98
12/12/2012	5205695	FC	$228.66	980	-$5.98
12/12/2012	5224673	SM	$1,078.64	5,474	-$5.98
12/12/2012	5224720	SM	$364.32	0	-$5.98
12/12/2012	5224722	SM	$160.43	0	-$5.98
12/12/2012	5224733	SM	$.84	4	-$5.98

Download to Excel

Figure 14: Permit Balance Detail table.

Read the content that follows for a more complete description of the information displayed in the Earned Value Detail Report section.

Mailing Date: The date when a portion of, or all of the earned credit was used to pay for postage on the respective postage statement.

Postage Statement Seq. Number: The sequence number of the respective postage statement; a unique identifier that facilitates finding postage statement.

Mail Class: The mail class of the pieces associated to the respective postage statement.

Total Adjusted Postage: The remaining balance on the postage statement after the incentive amount has been subtracted from the original postage amount.

Total Pieces: The total number of pieces charged on the respective postage statement.

Incentive Amount: The portion of the earned credit used up to pay for the respective postage statement.

6 Frequently Asked Questions (FAQ)

1. What is a BSA and why is it required?

A Business Service Administrator (BSA) is the person authorized to control who can access a business service on behalf of your company. A BSA has power over all service and location combinations for which they are the BSA. You should only become the BSA for a service and location combination if you are elected by your company to perform this role.

2. What is a contingent BSA and when is it required?

Because Incentive Programs involve financial data, an extra approval layer has been added to protect your data. If there is no BSA for Incentive Programs, the BSA for Manage Mailing Activity must approve whoever requests to become the BSA for Incentive Programs. This approval must be provided for each of your company's locations. Once you become the BSA for Incentive Programs for a location you can approve or deny access to the service for that location.

Enrolling all of your business locations (CRIDs) for the Incentive Programs Service ensures that all of your permits are linked to the program and become enrolled.

When requesting access to Incentive Programs, the request will be pending until a BSA for Manage Mailing Activity approves your request for access. If there is no BSA for Manage Mailing Activity, upon requesting access to Incentive Programs you can become the BSA for Manage Mailing Activity. Your request for Incentive Programs will be approved automatically. Otherwise if you opt not to assume the BSA role, you will have to wait until the forthcoming Incentive Programs BSA approves your request.

3. For which locations should I become the BSA?

It is generally recommended that you become the BSA if no BSA exists for a service and location combination. You should become the BSA if you want to manage other user's access to the service for a particular location.

If a service requires BSA approval, there must be a BSA established for your company's mailing locations before members of your company can gain access to the service for those locations. Otherwise the request for the service will remain in "pending". After 25 days, if the BSA role is not filled, your request will automatically be purged, without notification.

4. How can I add a new location to Incentive Programs after I'm done with the enrollment process?

Complete section 1 of the enrollment guide: "Request Incentive Programs", making sure that you select the <Add Location> button in step 1.4.

If you are experiencing difficulties while adding a location, refer to section 2 (a) of the Troubleshooting document.

5. Where can I see the CRID of a location for which I requested a service?

Select the ‘Request Status >>’ link located at the top of the page. This displays a page that contains a table with a list of all the locations for which requests have been made. Find the location by identifying the exact address and then select the link under the ‘Business Location’ column for the corresponding row. This opens up a pop-up window that displays the CRID of the location.

6. Where can I view my access to business services?

Sign in to the Business Customer Gateway and select the ‘Profile >>’ link located at the top of the page. This page lists all the locations and their associated services.

7. Where can I see the status of my requests to access Incentive Programs?

To look up the status of the request for all your locations, select the ‘Request Status >>’ link located at the top of the page. This page lists all of your requests. Make sure that you are looking at locations for which the Service is “Incentive Programs”.

8. What is the difference between requesting access to incentive programs and requesting access to a specific incentive?

Requesting access to incentive programs from the BCG determines who can access an incentive program on behalf of your company. Once access has been granted for the Incentive Programs service, you can select the incentive program and begin enrollment.

9. ***Why is it recommended to enter the CRID of a location when trying to add the location to my profile?***

Entering the CRID in the CRID data input field ensures that you uniquely identify the business name and address combination for your company. Even with an identical address, if you use variations of a company name, such as “My Company” and “My Company Global Services”, they may not be recognized as belonging to the same company by the address matching system. Entering the CRID circumvents this potential issue (opposed to entering address information in the address input fields).

7 Troubleshooting

1. **Step 1.1 Navigate to the BCG and sign in.**

a. What is the Business Customer Gateway web address?
https://gateway.usps.com

b. I can't sign in
If you're unable to sign in, it is because you either don't have an account or you're entering the incorrect username/password combination.

If you have an account, click on the 'I forgot my password' link and follow the instructions to reset your password.

2. **Step 1.4 Add all your Business Locations**

a. I don't know the CRID of the location that I want to add
There are two reasons why you might not know the CRID of a location you're trying to add.

i. New Location
Your location will be a new location in our system. CRIDs are assigned by the USPS. Locations, which are not currently in our system, mean a CRID has not yet been assigned.

ii. Existing Location
All existing locations have been assigned a CRID. In this case, you may simply not know the CRID. Note: To see if a CRID exists, you can call the *PostalOne!* Customer Care Center at (800) 522-9085 or postalone@email.usps.gov.

For a New Location, select the 'Business Name and Address' radio button and enter the exact address of the location you wish to add.

For an Existing Location, if you remember the exact name of the company and the exact address of the location as it was initially enrolled, you can select the 'Business Name and Address' radio button and enter the required information. It is recommended that you use the CRID of a location when it has one. If you don't know how to find the CRIDs of locations refer to 7 (b) below.

For more information on why you should add all of your business locations, see (3) of the FAQ sheet.
For more information on why you should use the CRID of a location to add it, see (9) of the FAQ sheet.

3. **Step 1.6 Confirm your Selection**

a. I don't know the CRID of the location I just added
To look up the CRID of any location, sign in to the Business Customer Gateway and select the 'Request Status >>' link located at the top of the page to access the display a pop-up window that displays the CRID.

4. **Step 1.7 Request to be the BSA for Incentive Programs**

a. Of which locations should I become the Business Service Administrator (BSA) for Incentive Programs?

Become the Incentive Programs BSA of a location if you are elected by your company to perform this role. The Incentive Programs BSA must approve all requests from other users to gain access to the service. As a result, there must be an Incentive Programs BSA for each location that you wish to register in the Incentive Programs service.

When requesting to become Incentive Programs BSA for a location, the request will be pending until the BSA for Manage Mailing Activity (MMA) for that location approves your request. If there is no BSA for Manage Mailing Activity, you can request this role. The request to become MMA BSA is approved automatically by the system when the role is vacant. If already pending, your request to become Incentive Programs BSA will be approved immediately by the system. Otherwise, if you are not to assume the Incentive Programs BSA role, you will have to wait until the Incentive Programs BSA approves your request.

5. <u>Step 1.7.2</u> Become the BSA for Manage Mailing Activity

a. Why could it be required?

The Manage Mailing Activity BSA must approve all users' requests to become Incentive Programs BSA. This contingent approval was put into place in the form of a human decision that could have otherwise been an automatic approval by the system. This dependency helps prevent unauthorized users from accessing your mailing activity and permit information. For more information about Contingent BSA and Contingent BSA Approval, see number (2) on the FAQ sheet.

6. <u>Step 2.3</u> Repeat 1.4, 1.5 and 1.6 above

a. I don't remember which were the locations entered in 1.4 for which I requested to become the BSA for Incentive Programs

To look up the status of any location, sign in to the Business Customer Gateway and select the 'Request Status >>' link located at the top of the page. This page lists all of your requests.

Find the locations with a status of "Pending External BSA" and select their name to access the pop-up window that contains the CRID.

b. I don't know the CRIDs of some locations

To look up the CRID of any location, sign in to the Business Customer Gateway and select the 'Request Status >>' link located at the top of the page. This displays a page with all of your requests. Find and select the location's name to access the pop-up window that contains the CRID.

c. I don't know if I'm entering the exact addresses that were entered in 1.4

Instead of entering addresses to add locations that were already entered in 1.4, it is recommended that you enter the CRIDs into the CRID input fields for existing locations. If you don't know how to find the CRIDs of locations refer to (b) directly above.

7. <u>Step 3.1</u> Select Incentive Programs under the Account Service category.

Incentive programs are published in advance of the program start date to enable you to register before the start of the promotion

8. Step 4 Enroll

Program Registration Landing Page

a. When I select an Incentive Program, the message "This program is not available for enrollment" is displayed. Why can't I enroll?

Not all Incentive Programs are available for enrollment for all customers. This indicates one of two things:

i. The current date falls outside of the Incentive Program's specified registration time period.
   or
ii. You are not eligible to enroll for the Incentive Program because you do not have an eligible or pre-qualified permit. Refer to the requirements and parameters in the program description.

If you believe neither of these is your case, contact the Program Office by using the Program Assistance tab.

Locations Page

b. I thought I had enrolled a location for Incentive Programs in the BCG, but I don't see it in the 'Locations' tab.

The first step towards resolving this issue is to verify that you actually enrolled the location(s) to Incentive Programs. To do this, navigate to the Business Customer Gateway and sign in. To look up the status of any location, select the 'Request Status >>' link located at the top of the page. This displays a page with all of your requests. Make sure that your locations have a Status of "Approved" and that the Service is "Incentive Programs".

If your Location's Service is different from "Incentive Programs" you need to complete section 1 of the Enrollment Guide.

If your Location's Status is "Pending BSA", this means that the BSA for Incentive Programs for your location needs to approve your request to have the location added to Incentive Programs.

If your Location's Status is "Pending External BSA" you need to complete section 1.7.2 of the Enrollment Guide.

8 Enrollment Scenarios

Program Dates	Start Date	End Date	Description
Registration Period for Mail Owners (MOs)	01/15/2013	03/31/2013	Mail owners will need to complete enrollment in the earned value promotion by **03/31/2013**. Mail owners will be unable to participate in this incentive after this date.
Registration Period for Mail Service Providers(MSPs)	02/11/2013	03/31/2013	Mail service providers (MSPs) will be able to enroll in the earned value promotion starting **02/11/2013**. The last day to complete enrollment is **03/31/2013**. MSPs will be unable to participate in this incentive after this date.
Award Period (Tracking Period)	04/01/2013	06/30/2013	The program office will be tracking and calculating MO and MSP credits for their Business Reply and Customer Reply mail pieces during this period.
Mailer Agreement Period	07/01/2013	07/31/2013	MSPs and mail owners will have to finalize their permit selection as well as the credit that they have accrued by clicking on <I Agree> on the payment accounts and my activity report tabs.
Award Claim Period	08/01/2013	N/A	Once the award claim period starts mail owners and MSPs will no longer be able to modify the permit they selected. It is only on or after the award claim period start date that mail owners and MSPs will be able to use all, or a portion of the credit they have accrued for the earned value promotion.

Scenario 1: Mailer owner enrolls and selects their eligible permit to receive a discount.	
Enrollment Steps	**Description**
Additional Contract Information	This tab allows mailer owners to enter and save their alternative contact information. Mail owners are required to enter their country, name, address, city, state, zip, phone number and e-mail address in order to complete this task.
Locations	The Locations tab allows mail owners to review their participating mailing locations. Mail owners must verify the accuracy of the displayed locations and select the <I Agree> button to complete this task.
Mailer IDs	The Mailer IDs tab will become available once the Locations tab has been completed. It allows mail owners to review their participating mailer IDs. Mail owners must verify the accuracy and completeness of the mailer IDs and select the <I Agree> button to complete this task.
Payment Accounts	The Payment Accounts tab allows mail owners to review their permits that are registered to their business locations. Mail owners will be able to change their permit selection until the end of the mailer agreement period. If mail owners would like their credit to be routed to their MSP permit refer to scenario 2.
Certification	The Certification tab becomes available once the preceding steps have been completed. Mail owners must agree to the Certification Agreement by selecting the <I Agree> button to complete this final enrollment step. Upon agreeing, mail owners are enrolled into the Incentive Program. Mail owners will know that they are fully enrolled when they see the Enrollment Status change to “Enrolled”.
Activity Report	The activity report provides mail owners with the ability to track their courtesy reply mail and business reply mail volumes as well as the credit accrued between the award period start and end date. Mail owners must click on <I Agree> by the end of the mailer agreement period so that they can receive the credit. The credit will be routed to the permit they selected in the payment accounts tab. No further action is required.
Permit Balance	This view enables mail owners to track the history of their credit usage by mailing date and mail class.

Scenario 2: Mailer owner enrolls in the earned value promotion and selects their MSP's Permit to receive credit. This functionality will be available for new and existing users on 02/11/2013.	
Enrollment Steps	**Description**
Additional Contract Information	This tab allows mailer owners to enter and save their alternative contact information. Mail owners are required to enter their country, name, address, city, state, zip, phone number and e-mail address in order to complete this task.
Locations	The Locations tab allows mail owners to review their participating mailing locations. Mail owners must verify the accuracy of the displayed locations and select the <I Agree> button to complete this task.
Mailer IDS	The Mailer IDs tab will become available once the Locations tab has been completed. It allows mail owners to review their participating mailer IDs. Mail owners must verify the accuracy and completeness of the mailer IDs and select the <I Agree> button to complete this task.
Payment Accounts	The Payment Accounts tab allows mail owners to review the permits that are associated to their registered business locations. Mail owners will be able to change their permit selection until the end of the mailer agreement period. Starting ***02/11/2013***, mail owners will be given the option to search and save their MSP permit. This functionality will enable mail owners to route the credit they received for their mailings to the MSP permit. Please verify the accuracy and completeness of the permits and select the one that you want to use as your credit destination account. Once the mail owners have made their selection, they must click on the <I Agree> button to complete this task.
Certification	The Certification tab becomes available once the preceding steps have been completed. Mail owners must agree to the Certification Agreement by selecting the <I Agree> button to complete this final enrollment step. Upon agreeing, mail owners are enrolled into the Incentive Program. Mail owners will know that they are fully enrolled when they see the Enrollment Status change to "Enrolled".
Activity Report	The activity report provides mail owners with the ability to track your courtesy reply mail and business reply mail volumes as well as the credit accrued between the award period start and end date. Mail owners must click on <I Agree> by the end of the mailer agreement period so that they can receive the credit. The credit will be routed to the permit they selected in the payment accounts tab. No further action is required.
Permit Balance	Mail owners, will be unable to view the permit balance report since they have selected a permit outside their profile.

Scenario 3: Mail service provider enrolls in the earned value promotion and selects their own permit. Mail service provides will be able to enroll in the earned value incentive starting 02/11/2013.	
Enrollment Steps	Description
Additional Contract Information	This tab allows MSP's to enter and save their alternative contact information. MSP's are required to enter their country, name, address, city, state, zip, phone number and e-mail address in order to complete this task.
Locations	The Locations tab allows MSP's to review their participating mailing locations. MSP's must verify the accuracy of the displayed locations and select the <I Agree> button to complete this task. Please refer to the user guide if you would like to associate new locations after you agree to the locations presented to you.
Mailer IDS	The Mailer IDs tab will only become available once the Locations tab has been completed. It allows MSP's to review their participating mailer IDs. MSP's must verify the accuracy and completeness of the mailer IDs and select the <I Agree> button to complete this task. Please refer to the user guide if a Mailer ID is added to one your participating CRIDs after you have agreed to the list presented in the Mailer ID tab.
Permit Accounts	The Permit Accounts tab allows MSP's to review the permits that are associated to their registered business locations. MSP's will be able to change their permit selection until the end of the mailer agreement period .MSP's must verify the accuracy and completeness of the permits and select the one that they want to use as their credit destination account. Once the MSP's have finalized their selection, click on the <I Agree> button to complete this task.
Certification	The Certification tab becomes available once the preceding steps have been completed. MSP's must agree to the Certification Agreement by selecting the <I Agree> button to complete this final enrollment step. Upon agreeing, MSP's are enrolled into the Incentive Program. MSP's will know that they are fully enrolled when they see the Enrollment Status change to "Enrolled".
Activity Report	The activity report provides MSP's with the ability to track their courtesy reply mail and business reply mail volumes as well as the credit accrued between the award period start and end date. MSP's must click on <I Agree> by the end of the mailer agreement period so that they can receive the credit. The credit will be routed to the permit they selected in the payment accounts tab. No further action is required.
Permit Balance	This view lets you track the history of your credit's usage by mailing date and mail class.

Scenario 4: Mail service provider enrolls in the earned value promotion and selects their client's permit. This functionality will available on July 14th, 2013.	
Enrollment Steps	Description
Additional Contract Information	This tab allows MSP's to enter and save their alternative contact information. MSP's are required to enter their country, name, address, city, state, zip, phone number and e-mail address in order to complete this task.
Locations	The Locations tab allows MSP's to review their participating mailing locations. MSP's must verify the accuracy of the displayed locations and select the <I Agree> button to complete this task. Please refer to the user guide if you would like to associate new locations after you agree to the locations presented to you.
Mailer IDS	The Mailer IDs tab will only become available once the Locations tab has been completed. It allows MSP's to review their participating mailer IDs. MSP's must verify the accuracy and completeness of the mailer IDs and select the <I Agree> button to complete this task. Please refer to the user guide if a Mailer ID is added to one your participating CRIDs after you have agreed to the list presented in the Mailer ID tab.
Permit Accounts	The Permit Accounts tab allows MSP's to review the permits that are associated to their registered business locations. MSP's will be able to change their permit selection until the end of the mailer agreement period. The Postal Service has scheduled a system change for **July 14, 2013** that will allow MSP's to go into Program Registration and change the permit to that of your client. MSP's must verify the accuracy and completeness of the permits and select the one that you want to use as your credit destination account. Once the MSP's have finalized their selection, click on the <I Agree> button to complete this task.
Certification	The Certification tab becomes available once the preceding steps have been completed. MSP's must agree to the Certification Agreement by selecting the <I Agree> button to complete this final enrollment step. Upon agreeing, MSP's are enrolled into the Incentive Program. MSP's will know that they are fully enrolled when they see the Enrollment Status change to "Enrolled".
Activity Report	The activity report provides MSP's with the ability to track their courtesy reply mail and business reply mail volumes as well as the credit accrued between the award period start and end date. MSP's must click on <I Agree> by the end of the mailer agreement period so that they can receive the credit. The credit will be routed to the permit they selected in the payment accounts tab. No further action is required.
Permit Balance	MSP's will be unable to view the permit balance report if they have selected a permit outside their profile.

Date	Section	Reason For Revision	Version
	N/A	Initial Draft	1
2/5	Ineligible Permits	Updated language to reflect which forms of permits will be accepted for the promotion.	1.2
2/12		Included language to reflect MSPs being able to register for the promotion.	2.1