

# **The Incentives Program Pre-Production Environment**

# Agenda



## Background Information

- Accessing Incentive Programs via the BCG
- Login to Pre-Prod Environment
- Enrollment
- Reporting
- Resources

## Purpose



- The Program Registration Preproduction (“Pre-Prod”) Environment is a mirror/replica of the Production version of the Program Registration system, a web-based portal that provides the capability for customers to register for services.
- Pre-prod includes an external application for the customers, and an internal application for Help Desk users.
  - The Program Registration system provides an avenue for mailers and mail service providers (MSPs) to register and manage Incentive Programs, while the internal portion Program Registration serves as the user interface for the Help Desk
  - The Help Desk interacts with mailers during registration by approving certain tasks throughout the enrollment process.
- Program Registration interfaces with different systems to send and receive permit and customer information during and after enrollment.

Background

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The Program Registration Preproduction (“Pre-Prod”) Environment is a mirror/replica of the upcoming Production version of the Program Registration system, a web-based portal that provides the capability for customers to register for services, which includes an external application for the customers, and an internal application for Help Desk users. This training focuses on the external Program Registration application in the Preproduction environment.

The Program Registration system provides an avenue for mailers and mail service providers (MSPs) to register and manage Shipping Services and Incentive Programs, while the internal portion Program Registration serves as the user interface for the Help Desk. The Help Desk interacts with mailers during registration by approving certain tasks throughout the enrollment process. Program Registration interfaces with different systems to send and receive permit and customer information during and after enrollment. These interfaces may behave differently in the Pre-Prod environment, and this training identifies those differences for users.

## Intended Audience



- This training is intended for online Program Registration application users who have Production access and who would like to execute tests containing their data.
  - In Pre-Prod, users utilize their production information to evaluate new items, features, or programs before they are rolled out in the next release (usually about five to six weeks).
  - Pre-Prod is strictly a testing environment for users to conduct their own “what-if” scenarios without compromising or changing their real-world data in Production.
  - While this environment allows users to test pre-production features, Pre-Prod will not allow users to conduct shipping activities.
- This presentation outlines the following:
  - How to access the Pre-Prod environment from Production (and how to return to Production)
  - Data setup for testing in Pre-Prod
  - How interfaces interact in Pre-Prod

Background

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This guide outlines the following:

How to access the Pre-Prod environment from Production (and how to return to Production)

Data setup for testing in Pre-Prod

How one-click enrollment programs operates in Pre-Production (eVS<sup>®</sup> and Click-N-Ship Business Pro<sup>™</sup>)

How interfaces interact in Pre-Prod

# 2014 Promotions



	Description	Registration Period	Promo Period	Avail. In Preprod?	Mail Class / Proc. Category
<b>Branded Color Mobile Technology</b>	Mailers will have the opportunity to receive an upfront postage discount on qualifying mailings that use qualifying mobile print technology (such as a QR Code) on or in the mailpieces	Dec 15, 2013 – March 31, 2014	Feb 1- March 31, 2014		FCM SM (RN) / Letters & Flats
<b>Earned Value Reply Mail</b> <sup>1</sup>	Offered to mailers who send qualifying First-Class Mail Business Reply Mail (BRM) and Courtesy Reply Mail (CRM) enclosures.	February 15 – March 31, 2014	April 1- June 30, 2014	YES	FCM SM (RN)
<b>Premium Advertising</b> <sup>2</sup>	Encourages existing high-volume mail marketers and advertisers to use First-Class Mail as a marketing vehicle and offers an upfront discount on First Class Mail presort postage on mailpieces composed entirely of marketing or advertising content.	February 15 – June 30, 2014	April 1- June 30, 2014		FCM / Letters & Flats
<b>Mail and Digital Personalization</b> <sup>3</sup>	Offers an upfront discount to encourage mailers to utilize technology to create a more relevant, integrated marketing message through direct mail and digital channels. Both the mailpiece and PURL/website must be personalized to qualify for this promotion (variables may include: name, birthday, custom offer or different envelope, etc).	March 15 – June 30, 2014	May 1- June 30, 2014		FCM SM (RN) / Letters & Flats
<b>Emerging Technology (Near Field Comm.)</b> <sup>3</sup>	Encourages mailers to integrate direct mail with mobile technology. To participate in the promotion, the mailpiece must incorporate the use of standard NFC technology or other emerging technology as specified in program eligibility requirements to engage the mobile device in providing an interactive experience for the user.	June 15 - September 30, 2014	August 1- September 30, 2014	YES	SM (RN) / Letters & Flats
<b>Color in First-Class Mail Transactions Promotion</b> <sup>5</sup>	Encourages producers of bills and statements to produce and mail statements that create a greater connection and response from consumers by utilizing color ink on bills and statements. Provides an upfront postage discount to mailer who uses dynamic/variable color print on transactional mail that is required to be mailed as First-Class Mail. Eligible pieces must have variable color messaging (four-color-process) on the bill or statement.	June 15 – December 31, 2014	August 1 – December 31, 2014	YES	FCM Letters
<b>Mail Drives Mobile Commerce</b> <sup>3,4</sup>	Encourages marketers and retailers to utilize mobile purchasing technology with direct mail and catalogs to facilitate state of the art mobile purchases. An upfront postage discount is available on eligible mailpieces that include a mobile barcode or print/mobile technology that can be read or scanned by a mobile device and leads the recipient to a mobile-optimized shopping website.	September 15 - December 31, 2014	November 1 - December 31, 2014	YES	SM (RN) / Letters & Flats

[Background Information](#)

<https://ribbs.usps.gov/index.cfm?page=mailingpromotions>


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The 2014 Incentives Calendar for Mailing Services can be found on the RIBBS website.

There are two new incentives in 2014: the branded color mobile technology incentive and the premium advertising incentive. More information about all promotions are available at the URL shown here.

# Agenda



- Background Information
-  Accessing Incentive Programs via the BCG
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## Registration for Existing BCG Customers



- Accessing and enrolling in the Pre-Production Environment for Incentive Programs requires a Business Customer Gateway (BCG) account.
- If you are a BCG customer, you can use your existing username and password to login.
  1. Navigate to the BCG: <https://gateway.usps.com>
  2. Enter your user name and password in the fields provided and “Sign in”. You will be directed to the Welcome page.
- If you are not a BCG customer, you can access any of the following resources for guidance on setting up an account:
  1. Incentives Pre-Production Environment User Guide ([PDF](#))
  2. Business Customer Gateway Presentation ([PPT](#))

A screenshot of the "Sign In" page for the Business Customer Gateway. It features a "Sign In" heading, a "Username" input field, a "Password" input field, and a "Forgot password?" link. A blue "Sign in" button is positioned below the password field. At the bottom of the form, there is a note: "Not a registered USPS Business Customer?" followed by a "Register for free" button.

# Accessing Incentives Programs



Once logged in to the BCG, complete the following steps to enroll for an incentive program:

1. Select either Mailing Services or Shipping Services from the menu to the left of the Welcome Screen



2. Find Incentive Programs from the list displayed. You have access to this service if the button to the right says "Go To Service"

Automated Business Reply Mail	<a href="#">more info &gt;</a>	Go To Service
Balance & Fees (PostalOne!)	<a href="#">more info &gt;</a>	Go To Service
Customer Label Distribution System (CLDS)	<a href="#">more info &gt;</a>	Go To Service
Customer/Supplier Agreements (CSAs)	<a href="#">more info &gt;</a>	Go To Service
Dashboard (PostalOne!)	<a href="#">more info &gt;</a>	Go To Service
Electronic Data Exchange (PostalOne!)	<a href="#">more info &gt;</a>	Go To Service
Every Door Direct Mail	<a href="#">more info &gt;</a>	Go To Service
<b>Incentive Programs</b>	<a href="#">more info &gt;</a>	Go To Service
Intelligent Mail Small Business (IMs) Tool	<a href="#">more info &gt;</a>	Go To Service
Mailer ID	<a href="#">more info &gt;</a>	Go To Service
Mailing Reports (PostalOne!)	<a href="#">more info &gt;</a>	Go To Service
Manage Permits (PostalOne!)	<a href="#">more info &gt;</a>	Go To Service
Postal Wizard (PostalOne!)	<a href="#">more info &gt;</a>	Go To Service
Schedule a Mailing Appointment (FAST)	<a href="#">more info &gt;</a>	Go To Service

Accessing Incentive Programs via the BCG

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## Accessing Incentives Programs



3. If you do not have access to Incentive Programs, click on Get Access
  - If you are the first person to request access to a certain service, you will become the BSA for that service

Automated Business Reply Mail <a href="#">more info &gt;</a>	Get Access
Balance & Fees (PostalOne!) <a href="#">more info &gt;</a>	Get Access
Customer Label Distribution System (CLDS) <a href="#">more info &gt;</a>	Get Access
Customer/Supplier Agreements (CSAs) <a href="#">more info &gt;</a>	Get Access
Dashboard (PostalOne!) <a href="#">more info &gt;</a>	Get Access
Electronic Data Exchange (PostalOne!) <a href="#">more info &gt;</a>	Get Access
Every Door Direct Mail <a href="#">more info &gt;</a>	Get Access
<b>Incentive Programs <a href="#">more info &gt;</a></b>	<b>Get Access</b>
Intelligent Mail Small Business (IMSB) Tool <a href="#">more info &gt;</a>	Get Access
Mailer ID <a href="#">more info &gt;</a>	Get Access
Mailing Reports (PostalOne!) <a href="#">more info &gt;</a>	Get Access
Manage Permits (PostalOne!) <a href="#">more info &gt;</a>	Get Access
Postal Wizard (PostalOne!) <a href="#">more info &gt;</a>	Get Access
Schedule a Mailing Appointment (FAST) <a href="#">more info &gt;</a>	Get Access



4. If you are not the BSA, your access to Incentive Programs must be approved by the BSA for Incentive Programs at the business location you specified. Until approval is granted, your screen will show a pending status

Incentive Programs <a href="#">more info &gt;</a>	Pending External BSA
---	----------------------

Accessing Incentive Programs via the BCG

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## Pending Access Statuses



There are two types of pending statuses users may see (represented in the Mailing, Shipping, and Other Services tabs with orange color). They are:

- **Pending BSA** **Pending BSA**
  - Indicates that the BSA for that service must approve your request before you receive access.
  
- **Pending External BSA** **Pending External BSA**
  - The service requested (e.g. Incentive Programs) is contingent upon another service (e.g. Manage Mailing Activity) and therefore requires permission from the contingent service's BSA
    - MMA Activity includes the following subservices:
      - Dashboard
      - Balance and Fees
      - Electronic Data Exchange
      - Mailing Reports
      - Manage Reports
      - Postal Wizard

## The Role of the Business Services Administrator (BSA) in Granting Access



- There must be an Incentive Programs BSA for each location in order to complete enrollment
  - This approval must be provided for each of your company's locations
- It is generally recommended that you become the BSA if no BSA exists for a service and location combination
  - If you opt not to assume the BSA role, you will have to wait until the forthcoming Incentive Programs BSA approves your request
  - If after 25 days the BSA role is not filled, your request will automatically be purged without notification
- If user requesting BSA access to Incentive Programs is not BSA for Manage Mailing Activity, then the BSA for Manage Mailing Activity must approve requests to become the BSA for Incentive Programs
  - This approval must be provided for each of your company's locations

# Agenda

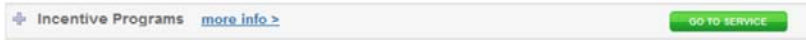


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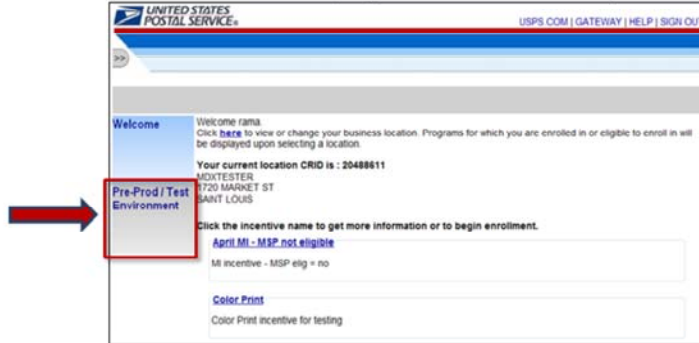
# Login to the Pre-Production Environment



1. Once you have access to Incentive Programs, click on Go To Service



2. On the Incentives Home page click on the Pre-Prod/Test Environment tab



**IMPORTANT NOTE:** the Pre-Prod tab will not be visible until the upcoming *PostalOne!* Price Change release. In the meantime, to access Pre-prod please copy and paste the below URL into the web browser after logging into the BCG:

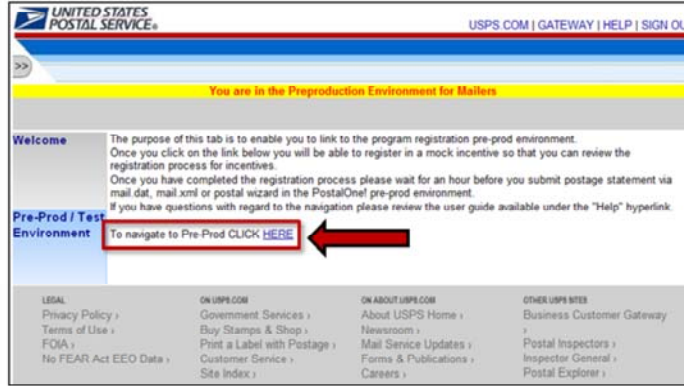
<https://programregistration-preprod.usps.com/?requestPage=PROGREGINCENTIVES>

Login to the Pre-Production Environment

# Login to the Pre-Production Environment



3. You will be directed to the following page. To continue to the pre-production environment click on the "Here" hyperlink

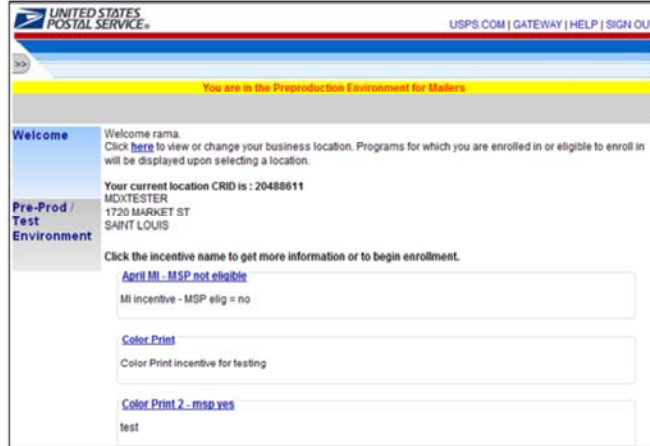


[Login to the Pre-Production Environment](#)

# Login to the Pre-Production Environment




4. The system will navigate to the Pre-production Incentives home page



Login to the Pre-Production Environment

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  - Additional Contact Information Tab
  - Location Tab
  - Mailer ID Tab
  - Payment and Permit Accounts Tab
  - Certification
- [Reporting](#)
- [Resources](#)



# Begin Enrollment



1. Select any Incentive Program that you would like to test with

The screenshot shows the USPS Incentive Program enrollment page for 'Earned Value QTP 89933'. The page includes a navigation bar with 'USPS.COM | GATEWAY | HELP | SIGN OUT' and a yellow banner stating 'You are in the Preproduction Environment for Mailers'. Below the banner, there are two buttons: 'Begin Enrollment' and 'Back to Incentives Home'. The main content area is divided into two sections: 'Program Summary' and 'Program Assistance'. The 'Program Assistance' section contains a table with the following data:

Period	Start Date	End Date
Registration Period	03/03/2014	04/30/2014
Incentive Period	03/03/2014	04/30/2014
Incentive Award Period 1	03/03/2014	04/30/2014
Mailer Agreement Period	03/04/2014	04/30/2014
Award Claim Period	03/03/2014	No End Date

Below the table, it states 'Last Updated: 03/28/2014 11:56 AM'.

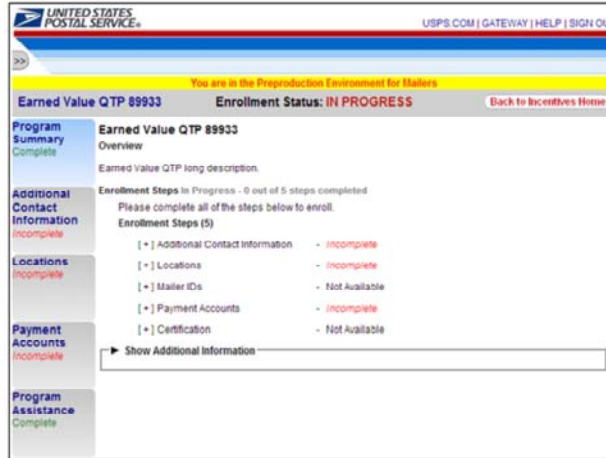
2. Select the [Begin Enrollment](#) button located at the top right corner of the page.

# Begin Enrollment



### 3. Follow the Enrollment Tasks

- 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



Enrollment

# Enrollment: 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

You are in the Preproduction Environment for Mailers

Emerging Tech 2014 Enrollment Status: IN PROGRESS [Back to Incestives Home](#)

**Program Summary**  
Provide an alternate contact for promotion specific matters. The Program Office will contact the alternate only in the event you are unavailable.

**Additional Contact Information**  
*Incomplete*

**Alternative Primary Contact Information (Required)**

Country:\* UNITED STATES

Name:\* Joe Schmoie

Address 1:\* 123 Main St

Address 2:

City:\* Washington

State:\* DISTRICT OF COLUMBIA

ZIP/Postal Code:\* 20001

Phone Number:\* 555-555-5555

Ext:

Email\* test@email.com

Fax Number:

**Technical Contact Information (Optional)**

Country: UNITED STATES

**Locations**  
*Incomplete*

**Payment Accounts**  
*Incomplete*

**Program Assistance**

Enrollment: Additional Contact Information Tab

# Enrollment: Locations Tab



- Allows you to review your participating mailing locations (applies to Earned Value and non-Earned Value incentives)

**Earned Value QTP 89933** Enrollment Status: **IN PROGRESS** [Back to Incentives Home](#)

**Program Summary** Complete

Below are your business locations where your permits are linked. Each unique location is assigned to a different Customer Registration ID (CRID). If you haven't done so, select the **I Agree** button to verify that you have reviewed your participating locations.

**Additional Information** Complete

TIP 1: If a location is missing, click [here](#) to add the location to your Incentive Programs enrollment. You must then follow the "Refreshing Your Profile" steps.

TIP 2: If you are already enrolled and later add a new location, follow the steps under "Refreshing Your Profile".

**Refreshing Your Profile**

- Log out by selecting the "SIGN OUT" link on the top right corner of the page.
- Close your browser completely (i.e. Close all windows and/or tabs).
- Log back into the [Business Customer Gateway](#) and navigate to the Incentive Program service by selecting the Incentive Programs link.
- Navigate to the Locations tab. Under the Enrollment Method column, verify the word "Online" displays for the newly added location.

**Payment Accounts** Complete

For more information regarding the data in the columns, place your cursor over the column title.

**Program Assistance** Complete

Filter:  by  for

Company	CRID	RSP Designation	Address	Enrollment Method	Enrollment Date
Unavailable Company Locations					
UNITED STATES	6639956	YES	605 5TH AVE S SEATTLE		...
The Masters of Mail	1575231	NO	70 Commerce Center Dr Lynchburg, VA		...
2500 Mail Company	2018807	YES	2500 4th Street Providence, RI		...
The Company of Mail	...	YES	88 Eighty Eight St Lynchburg, VA		...
Mail Enrollment Loc	4827337	...	300 Park at Lynchburg, VA		...
YEST DATA	28114107	NO	1151 BEST ON VAL		...

**Earned Value QTP 89933** Enrollment Status: **IN PROGRESS** [Back to Incentives Home](#)

**Program Summary** Complete

Below are your business locations where your permits are linked. Each unique location is assigned to a different Customer Registration ID (CRID). If you haven't done so, select the **I Agree** button to verify that you have reviewed your participating locations.

**Additional Information** Complete

TIP 1: If a location is missing, click [here](#) to add the location to your Incentive Programs enrollment. You must then follow the "Refreshing Your Profile" steps.

TIP 2: If you are already enrolled and later add a new location, follow the steps under "Refreshing Your Profile".

**Refreshing Your Profile**

- Log out by selecting the "SIGN OUT" link on the top right corner of the page.
- Close your browser completely (i.e. Close all windows and/or tabs).
- Log back into the [Business Customer Gateway](#) and navigate to the Incentive Program service by selecting the Incentive Programs link.
- Navigate to the Locations tab. Under the Enrollment Method column, verify the word "Online" displays for the newly added location.

**Payment Accounts** Complete

For more information regarding the data in the columns, place your cursor over the column title.

**Program Assistance** Complete

Filter:  by  for

Enrollment: Locations Tab

# Enrollment: Locations Tab



- In the pre-production environment you will be unable to change your MSP designation for both available and unavailable locations. Hence, the <Edit> button is disabled
  - This functionality will be available only in the production environment
- You must verify the accuracy of the displayed locations and select the <I Agree> button to complete this task.
- This information will be displayed based on the locations you have access to in BCG

The screenshot shows the 'Enrollment: Locations Tab' interface. On the left, a table lists company locations. A red dashed box highlights a portion of this table, and red arrows point to a zoomed-in view of the table on the right. The zoomed-in view shows two sections: 'Available Company Locations' and 'Unavailable Company Locations'. Each section contains a table with columns: Company, CRID, MSP Designation, Address, Enrollment Method, Enrollment Date, and Change MSP Designation. The 'Change MSP Designation' column contains an 'Edit' button for each row.

Company	CRID	MSP Designation	Address	Enrollment Method	Enrollment Date	Change MSP Designation
UNITED STATES	5030556	YES	605 5TH AVE S SEATTLE			Edit
Post-Enrollment Loc	4821337	YES	245 Pera st Lacer PA			Edit
The Company of Mail	5155336	NO	88 Eighty-Eight St Loretto MI			Edit

Enrollment: Locations Tab

# Enrollment: Locations Tab



- Shared business locations may be unavailable for enrollment when they have already been enrolled by another user and are denoted with an asterisk (\*)
- A business location is referred to as shared when it has been registered for the Incentive Program’s service by multiple users
- Shared business locations apply ONLY to earned value incentives
- You will not get credit for CRIDs that have been previously registered by another user

Available Company Locations:				
Company	CRID	Address	Enrollment Method	Enrollment Date
UNITED STATES	5030556	605 5TH AVE S SEATTLE		
The Masters of Mail	5170321	78 Seventy-Eight St Looney KS		

Showing 1 - 2 of 2

Export options: CSV | Excel | XML | PDF

Unavailable Company Locations:				
Company	CRID	Address	Enrollment Method	Enrollment Date
Post-Enrollment Loc	* 4821337	245 Pera st Lacer PA		
The Company of Mail	* 5155336	88 Eighty-Eight St Loretto MN		
2350 sit Users Company	* 20166917	2350 sit Users Street Alexandria CT		

Showing 1 - 3 of 3

Export options: CSV | Excel | XML | PDF

\* - Indicates a shared CRID  
Shared CRIDs are Unavailable for enrollment when they have already been enrolled by another user.

# Mailer ID Tab



- Only available once Locations tab has been completed
- Appears **only for Earned Value Incentive**
- Allows you to review your participating Mailer IDs (MIDs)
- Must verify MIDs' accuracy and completeness and select the "I Agree" button (shown on next slide)

You are in the Preproduction Environment for Mailers

**Earned Value QTP 89933**      **Enrollment Status: IN PROGRESS**      [Back to Incentives Home](#)

**Program Summary**  
Complete

Verify that your Mailer IDs are listed correctly and select the "I Agree" button below to complete this enrollment step. If one or more of your MIDs is missing, please click this link to the [Business Customer Gateway](#) and verify that the location to which the MID is linked is registered for the Incentive Programs service.

For more information regarding the data in the columns, place your cursor over the column title

Per Page: 20

Filter: [Select Table] by [Select Category] for [ ]      [Filter](#)      [Clear Filter](#)

**Locations**  
Complete

**Available Mailer IDs**      Showing 1 - 2 of 2

MID	Shared?	CRID	Street Address	City	State	ZIP Code	Tracking Request Date
900008040	Yes	20400393	56 DUPLAINVILLE RD	SARATOGA SPGS	NY	12866-9020	
900008298	Yes	20400393	56 DUPLAINVILLE RD	SARATOGA SPGS	NY	12866-9020	

Export options: CSV | Excel | XML | PDF

**Mailer IDs**  
Incomplete

**Payment Accounts**  
Unavailable Mailer IDs

Enrollment: Mailer ID Tab

## Mailer ID Tab: Unavailable MIDs



- Shared MIDs might be unavailable for enrollment when they have already been enrolled by another user
  - A MID is “shared” when its parent CRID has been registered for the Incentive Program’s service by multiple users

Unavailable Mailer IDs Showing 1 - 9 of 9

MID	Shared?	CRID	Street Address	City	State	ZIP Code
900008040	Yes	20400393	56 DUPLAINVILLE RD	SARATOGA SPGS	NY	12866-9020
900008298	Yes	20400393	56 DUPLAINVILLE RD	SARATOGA SPGS	NY	12866-9020
900005241	Yes	20488602	W223 N3484 DUPLAINVILLE ROAD Near PO	PEWAUKEE	WI	53072-4175
900005250	Yes	20488602	W223 N3484 DUPLAINVILLE ROAD Near PO	PEWAUKEE	WI	53072-4175
900005251	Yes	20488602	W223 N3484 DUPLAINVILLE ROAD Near PO	PEWAUKEE	WI	53072-4175
900008562	Yes	20488602	W223 N3484 DUPLAINVILLE ROAD Near PO	PEWAUKEE	WI	53072-4175
900008581	Yes	20488602	W223 N3484 DUPLAINVILLE ROAD Near PO	PEWAUKEE	WI	53072-4175
900008043	Yes	20400500	3201 LEBANON RD	DANVILLE	KY	40422-9604
900008565	Yes	20500318	824 MIDWAY AVE	SAN LEANDRO	CA	94577-1342

Export options: CSV | Excel | XML | PDF

I Agree  I Disagree

Enrollment: Mailer ID Tab

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First in first out basis – add example



# Mailer ID Tab: Unavailable MIDs



- Availability of shared MIDs is determined on a First-In-First-Out basis
- The first user to login will see their shared MID in the *Available Mailer IDs* table:

Available Mailer IDs							Page 1 of 7
MID	Shared?	CRID	Street Address	City	State	ZIP Code	Tracking Request Date
800005040	Yes	20400300	56 DUPLAINVILLE RD SPUS	SARATOGA SPUS	NY	12866 9000	
800005298	Yes	20400300	56 DUPLAINVILLE RD SPUS	SARATOGA SPUS	NY	12866 9000	

- Once an incentive is applied to this MID, any other users who share the MID will see this MID in the *Unavailable Mailer IDs* table upon logging in:

Unavailable Mailer IDs							Page 1 of 3
MID	Shared?	CRID	Street Address	City	State	ZIP Code	Tracking Request Date
800005040	Yes	20400300	56 DUPLAINVILLE RD SPUS	SARATOGA SPUS	NY	12866 9000	
800005298	Yes	20400300	56 DUPLAINVILLE RD SPUS	SARATOGA SPUS	NY	12866 9000	
800005241	Yes	20488800	7023 NORTH DUPLAINVILLE ROAD NEW ID	PEWAWKEE	WI	53072 4175	
800005290	Yes	20488800	7023 NORTH DUPLAINVILLE ROAD NEW ID	PEWAWKEE	WI	53072 4175	

**EXAMPLE:** MID 987654321 shared by John Doe and Sally Smith:

### Scenario 1

- John logs in before Sally and applies an incentive to MID 987654321
- Sally logs in after John and sees 987654321 in the **Unavailable Mailer IDs** section

### Scenario 2

- John logs in before Sally and does not apply an incentive to MID 987654321
- Sally logs in after John and sees 987654321 in the **Available Mailer IDs** section

Enrollment: Mailer ID Tab

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First in first out basis – add example

# Payment Accounts Tab



- Allows you to review the permits associated to your registered business locations
  - Depending on the permit types allowed by the incentive program, your permits will be listed as either **eligible** or **ineligible**
  - Verify your permits by selecting “I Agree”
- **Note:** For Earned Value, once you’ve verified your permits, you must finalize your selections before the award claim period begins

Your permit accounts are shown below. Verify that what is listed is correct. If you do not see a permit and you are sure that it is, locate it out of the enrolled CDSs displayed in the Locations tab. See the following steps to link the missing permit.

1. Return to the BCC homepage.
2. Select the Missing Permits link (under Account Services).
3. Select which location you want to link the permits (click the company name associated to the location).
4. Navigate to Payment/Permit Accounts Tab.
5. Enter the four pieces of information precisely: 1) Account Number, 2) Account Type, 3) Post Office ZIP Code where you obtained your permit and, 4) One of the most recent transactions.

After successful authentication, the permit account will be linked to the selected business location and will be visible on this tab.

Once your permit has been linked, go back to the Incentive Programs service from your homepage, navigate back to this tab and ensure that all your permits are listed below. Otherwise, wait up to 30 minutes before using that permit account for the electronic download.

File:  Select Table:  or  Select Category:  or

**Eligible Permits** Showing 1 - 20 of 133 items

CDS	Permit Account Number	Permit Type	Permit Number/Invoice Number	Permit ZIP	PO Address
3456899	123	CR	48	362093	20224-0002
3456899	123	CR	48	161872	20224-0004
3456899	123	CR	48	266870	20224-0002
3456899	123	CR	48	264270	20224-0002
3456899	123	CR	48	762289	20224-0002
3456899	123	CR	48	482270	20224-0002
3456899	123	CR	48	044482	20224-0002
3456899	123	CR	48	107100	20224-0002
3456899	123	CR	48	476684	20224-0002
3456899	123	CR	48	272348	20224-0002
3456899	123	CR	48	164470	20224-0002
3456899	123	CR	48	072700	20224-0002
3456899	123	CR	48	179970	20224-0002
3456899	123	CR	48	357490	20224-0002
3456899	123	CR	48	271426	20224-0002
3456899	123	CR	48	177600	20224-0002
3456899	123	CR	48	068100	20224-0002
3456899	123	CR	48	020000	20224-0002
3456899	123	CR	48	387666	20224-0002
3456899	123	CR	48	497798	20224-0002

Export options: CSV | Excel | IMB | PDF

**Ineligible Permits** Showing 1 - 1 of 1 items

CDS	Permit Account Number	Permit Type	Permit Number/Invoice Number	Permit ZIP	PO Address
3456899	123	CR	952490	20224-0002	

Export options: CSV | Excel | IMB | PDF

Enrollment: [Payment and Permit Accounts Tab](#)

Note: this screen is for a non-Earned Value Incentive

# Payment Accounts Tab: Earned Value Functionality – Select Multiple Permits



- The Payment Accounts tab has additional permit management functionality for the **Earned Value Incentive** only
- You can select one or more permits to split your credit by allocating percentage values to each permit
  - Total Percentage must equal 100% or an error message will appear

The screenshot shows the 'Payment Accounts' tab interface. On the left is a navigation menu with options: Program Summary, Additional Contact Information, Locations, Payment Accounts (highlighted), Certification, and Activity Report. The main content area displays permit management options. A blue callout bubble points to the 'Add' button in the 'Eligible Permits' table, stating: 'To assign a percentage to a single permit or multiple permits, click on the ADD button'. Another blue callout bubble points to the 'Update Percentage' button, stating: 'Allocate a percentage amount and click "Update Percentage"'. The interface includes a table for 'Selected (Multiple) Permits' with columns: Permit, Type, Finance Number, CRID, ZIP/Postal Code, CAPS, and Percentage. Below it is a table for 'Eligible Permits' with columns: Permit, Type, Finance Number, CRID, ZIP/Postal Code, and CAPS. At the bottom, there is a 'Custom MSP Permit Search' section with input fields for Permit Number and Permit Type, and a Search button.

Enrollment: Payment and Permit Accounts Tab

# Payment Accounts Tab: Earned Value Functionality – Remove Permits



- You may change the selected eligible or custom permit at any time up to the start of the Award Claim Period
  - Note: once credit has been released, you will be unable to change your permit selection

To change your permit percentage allocation, click on the "Remove" Button, then click "I Agree" at the bottom of the screen to finalize your changes

Your permit accounts are shown below. Verify that what is listed is correct. If you do not see a permit and you are sure that it is linked to one of the enrolled CRIDs disclosed in the Locations tab, take the following steps to link the missing permit.

**Cropped Page**

Selected (Multiple) Permits: Showing 1 - 1 of 1

Remove	Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS	Percentage
	899	PI	164950	94543555	619389998		50

Totals Percentage 50% [Update Percentage](#)

Eligible Permits: Showing 1 - 1 of 1

Add	Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS
	* 1000	PC	517716	4430515	240229998	

Export options: CSV | Excel | XML | PDF

Ineligible Permits: Showing 1 - 4 of 4

Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS
* 17353025	PE	999924	4430515	99998	
* 9205823	PE	999924	4430515	99998	
* 17353025	PE	999922	4430515	999990000	
* 9205823	PE	999922	4430515	999990000	

Export options: CSV | XML | PDF

Custom MSP Permit Search

Please check with your MSP on what permit information should be entered.

\* Permit Number:  \* Permit Type:  Search

City:  \* State Code:

Enrollment: Payment and Permit Accounts Tab

# Payment Accounts Tab: Earned Value Functionality – Custom Permit Search



- Available to both Mail Owners and Mail Service Providers (MSPs)
- To search for and retrieve MO/MSP information, enter the permit number, permit type, and state code:

CRID	Permit Account Number	Permit Type	Permit Number	Finance Number	Permit ZIP	PO Address
20163414		MR	* 124000	517716	240229999	Post Office Roanoke VA 24022-9999
20163414		MR	* 123000	517716	240229999	Post Office Roanoke VA 24022-9999
20163414		ER	* 12345000	517716	240229999	Post Office Roanoke VA 24022-9999
20163414	1516440	PP	* 21	517716	240229999	Post Office Roanoke VA 24022-9999
20163414	1519387	PP	* 74	164950	619389999	Post Office Mattoon IL 61938-9999
20163414	1716256	PM	* 1	517716	240229999	Post Office Roanoke VA 24022-9999
20163414	2639045	ER	* 1001	517716	240229999	Post Office Roanoke VA 24022-9999

Export options: CSV | Excel | XML | PDF

\* Indicates a Payment/Permit Account that is linked to a CRID that you share with another user

**Custom Permit Search**  
Please check with your MSP or Mail Owner on what permit information should be entered.

\* Permit Number:  \* Permit Type:

City:  \* State Code:

- Select the permit you want to allocate your credit to and click "Save"

**Select Permit**

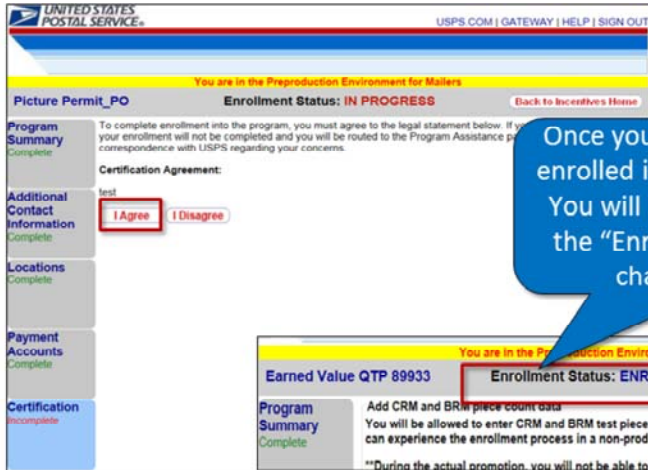
Select	Permit Number	Permit Type	Finance Number	City	State	CRID	Business Name	Address
<input checked="" type="checkbox"/>	175	PI	414080	SARATOGA SPGS	NY	20165090	QUAD GRAPHICS SARATOGA SPRINGS	56 DUPLAINVILLE RD.

Enrollment: Payment and Permit Accounts Tab

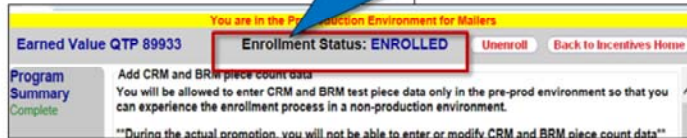
# Certification



- Becomes available once all preceding steps have been completed
- You must agree to the Certification Agreement by selecting the “I Agree” button




Once you agree, you are officially enrolled in the Incentive Program. You will know this when you see the “Enrollment Status” banner change to ENROLLED



Enrollment: Certification

# Agenda



- [Background Information](#)
- [Accessing Incentive Programs via the BCG](#)
- [Login to Pre-Prod Environment](#)
- [Enrollment](#)
-  [Reporting](#)
  - [Earned Value](#): Activity Report and Permit Balance Report
  - [Non-Earned Value](#): Mailer Owner Activity Report and MSP Activity Report
- [Resources](#)



# Earned Value Reporting: Activity Report Tab



Once completely enrolled, the Activity Report and Permit Balance tabs will be displayed below the Certification tab

- Activity Report Tab:** provides high-level and detailed views of volume and earned credit from returned Business Reply Mail (BRM) and Courtesy Reply Mail (CRM) pieces
  - Tells you where your earned credit is coming from
  - You will have the ability to add pieces to each of your MIDs and CRIDs in pre-production; this functionality is not available in production

View in the Production Environment for Mailers

Earned Value\_Patch\_April 6 Enrollment Status: ENROLLED [Unenroll](#) [Back to my mailers home](#)

**Program Summary**  
The purpose of this report is to display your mailings and the award amount you have accrued. Your award amount will not be finalized until the end of the award period.

Permit Number	Permit Type	Finance Number	Percent Allocated	Amount
105	PI	517716	50%	\$215,474.50
743	WT	517716	50%	\$215,474.50
				<b>Total Available Credit</b> \$432,949.20

**Locations**  
Complete

**Mailers IDs**  
Complete

**Payment Accounts**  
Complete

**Certification**  
Complete

**Activity Report**  
Complete

**Permit Balance**  
Complete

[I Agree](#) [I Disagree](#)  
[Download to Excel](#)

**Earned Value Summary**

Award Start Date	Award End Date	Total Volume CRM	Total Volume BRM	Award Amount
01-05-2013	04-04-2014	251,000	165,092	\$182,949.20
		<b>Subtotal</b> 251,000	165,092	\$182,949.20
		<b>Adjustment</b> 0	500,000	\$250,000.00
		<b>Grand Total</b> 251,000	665,092	\$432,949.20
				<b>Other Credits*</b> \$0.00
				<b>Total Available Credit</b> \$432,949.20

\*Credit belongs to other users

**Earned Value Detail Report**

CRID	Company	MID	JAN 2013		FEB 2013		MAR 2013		APR 2013	
			CRM	BRM	CRM	BRM	CRM	BRM	CRM	BRM
20183414	MCHTESTERY	80000048	14,264	8,507	18,835	9,724	18,955	11,013	17,201	11,500

Reporting: Earned Value



# Earned Value Reporting: Activity Report



- Able to enter/modify CRM and BRM pieces so you can experience the end-to-end process when it comes to enrollment

You are in the Preproduction Environment for Mailers

Earned Value QTP 89933 Enrollment Status: ENROLLED [Unenroll](#) [Back to Incentives Home](#)

**Program Summary**  
Complete

Add CRM and BRM piece count data  
You will be allowed to enter CRM and BRM test piece data only in the pre-prod environment so that you can experience the enrollment process in a non-production environment.  
\*\*During the actual promotion, you will not be able to enter or modify CRM and BRM piece count data\*\*

**Additional Contact Information**  
Complete

Please enter the CRM and BRM piece count data then click the [Add] button.

\*Mailer ID: --Select MID-- \*Service Type: --Select Type-- \*Delivery Date: \*Pieces:

Action	Mailer Id	Service Type	Delivery Date	Pieces
[Edit] [Delete]	187485339	CRM	03/06/2014	118
[Edit] [Delete]	187485339	CRM	03/07/2014	44
[Edit] [Delete]	187485339	CRM	03/08/2014	76
[Edit] [Delete]	187485339	CRM	03/09/2014	119
[Edit] [Delete]	187485339	CRM	03/10/2014	18
[Edit] [Delete]	187485339	CRM	03/11/2014	149
[Edit] [Delete]	187485339	CRM	03/12/2014	85
[Edit] [Delete]	187485339	CRM	03/13/2014	135
[Edit] [Delete]	187485339	CRM	03/14/2014	330
[Edit] [Delete]	187485339	CRM	03/15/2014	244
[Edit] [Delete]	187485339	CRM	03/16/2014	296

**Payment Accounts**

Note that you can edit or delete specific rows in the table

- Select MID and Service Type from the dropdowns and enter the Delivery Date and # of Pieces
- Click "Add" to create an entry in the table

# Earned Value Reporting: Permit Balance Tab



Once completely enrolled, the Activity Report and Permit Balance tabs will be displayed below the Certification tab

- Permit Balance Tab:** provides high-level and detailed views of your credit usage as it gets used up to pay mailings
  - Allows you to track history of your earned credit
  - Report will populate with data once postage statements are finalized in the *PostaOne!* pre-production environment

You are in the Preproduction Environment for Mailers

Earned Value\_Patch\_April 6 Enrollment Status: ENROLLED [Unenroll](#) [Back to Preproduction Home](#)

**Program Summary**  
This report will only show permits you are authorized to view. If you selected periods outside of your profile to receive credit, they will not display on this report.

**Additional Contact Information**  
[Complete](#)

**Locations**  
[Complete](#)

**Permit Balance Report**  
The purpose of this report is to provide you with a detailed view of your credit usage by mail class.

**Permit Balance Summary**

Company Name	Permit Number	Permit Type	Finance Number	Credit Accepted	Credit Used	Number Of Postage Statements	Standard Mail	Net Post
MCHESTER1	506	PI	517716	\$216,474.00	\$0.00	0	\$0.00	\$0.00
MCHESTER1	743	MT	517716	\$216,474.00	\$0.00	0	\$0.00	\$0.00

**Permit Balance Detail**

Mailing Date	Postage Statement Seq Number	Mail Class	Permit Number	Permit Type	Finance Number	Total Advised Postage	Total Pieces	Incentive Amount
Nothing found to display.								

[Download to Excel](#)

**Payment Accounts**  
[Complete](#)

**CERTIFICATION**  
[Complete](#)

**Activity Report**  
[Complete](#)

**Permit Balance**  
[Complete](#)

# Earned Value Reporting: Activity Report



- Top section of report shows percentage allocation for your credit

Permit Number	Permit Type	Finance Number	Percent Allocated	Amount
42	PI	517716	50%	\$1,111.11
81	PI	517716	50%	\$1,111.11
<b>Total Available Credit</b>				\$2,222.22

*Note:* this will update automatically if you change your percentage allocation in the Payment Accounts tab

- Bottom section shows Earned Value Summary and Earned Value Detail reports

### Earned Value Summary

Award Start Date	Award End Date	Total Volume CRM	Total Volume BRM	Award Amount
10-30-2013	11-08-2013	0	0	\$0.00
Subtotal		0	0	\$0.00
Adjustment		222,222	0	\$2,222.22
Grand Total		222,222	0	\$2,222.22
Other Credit *				\$0.00
<b>Total Available Credit</b>				\$2,222.22

\* Credit belongs to other users

### Earned Value Detail Report

CRID	Company	MID	JUN 2012		JUL 2012		AUG 2012		Credit Amount for CRM	Credit Amount for BRM
			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	Total	Total	Net	Net	Credit			
CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces	CRM Adjustment	BRM Adjustment	CRM	BRM	Amount for CRM	Amount for BRM	
1,048	2,048	3,448	1,199	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

Reporting: Earned Value

## Earned Value Reporting: Activity Report



- **Earned Value Summary View**

- Displays Total Volumes for your participating CRM and BRM pieces as well as total Award Amount
- Allows you to see how your earned Award Amount grows as more and more returned pieces are scanned and entered into the system
- Other Credit: 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

Earned Value Summary

Award Start Date	Award End Date	Total Volume CRM	Total Volume BRM	Award Amount
10-30-2013	11-08-2013	0	0	\$0.00
	Subtotal	0	0	\$0.00
	Adjustment	222,222	0	\$2,222.22
	Grand Total	222,222	0	\$2,222.22
			Other Credit *	\$0.00
			Total Available Credit	\$2,222.22

\* Credit belongs to other users

Reporting: Earned Value

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# Earned Value Reporting: Activity Report



- **Earned Value Detail Report**

- Provides a detailed view by Mailer ID
- Each row represents a different MID and displays the total returned volume broken down into CRM and BRM pieces by month
- Reference the [USPS Pre-Prod User Guide](#) for a detailed explanation of each report column **(add link once posted)**

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



Reporting: Earned Value

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<https://ribbs.usps.gov/index.cfm?page=mailingpromotions>

## Action Buttons On Activity Report



I Agree

I Disagree

- **I Agree**

- Clicking on this will release the credit to the *PostalOne!* pre-prod environment (an action which cannot be undone), so please make sure you've selected the right permits and entered in test data appropriately

- **I Disagree – ACTIVE BUT DO NOT CLICK IN PRE-PROD**

- Click this if there are discrepancies that you can validate to USPS. Enter a valid reason and appropriate documentation so the program office can review and resolve your discrepancy
- Since you are in the pre-prod environment, this functionality will **NOT** apply

Reporting: Earned Value

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# Earned Value Reporting: Permit Balance Report



- **Permit Balance Summary Report**

- Displays high-level view of your credit usage by mail class
  - Includes amount of credit used per mail class, # of postage statements per mail class on which credit was used, and the remaining credit balance
- Information is refreshed nightly to reflect data updates from previous day

Company Name	Permit Number	Permit Type	Finance Number	Credit Acquired	First Class			Standard Mail		Non-Profit		Credit Balance	Date and Time Credit Released
					Credit Used	Number Of Postage Statements	Credit Used	Number Of Postage Statements	Credit Used	Number Of Postage Statements			
Core Mailers	42	PI	517716	\$1,111.11	(\$50.20)	1	0	2	\$0.00	0	\$782.71	11/14/2013 13:44	
Core Mailers	81	PI	517716	\$1,111.11	(\$1,111.11)	1	\$0.00	0	\$0.00	0	\$0.00	11/19/2013 8:34	

# Earned Value Reporting: Permit Balance Report



- **Permit Balance Detail Report**

- Provides detailed view of your credit usage broken down by each individual postage statement
- Includes information such as the amount of credit used per postage statement, the date it was used, and the postage statement's sequence number

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](#)

Reporting: Earned Value



# Agenda



- [Background Information](#)
- [Accessing Incentive Programs via the BCG](#)
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  - [Earned Value](#): Activity Report and Permit Balance Report
  - [Non-Earned Value](#): Mailer Owner Activity Report and MSP Activity Report
- [Resources](#)



## Non-Earned Value Reporting



- For Incentive Programs other than Earned Value, users will still see an “Activity Reporting” tab once certification is complete
- Two versions of Activity Report: one for Mail Owners and one for Mail Service Providers (MSPs)
  - If you have both MSP and MO CRIDs, you will be able to view both versions of the Activity report

# Non-Earned Value Reporting: Mail Owner Activity Report



- **Mail Owner Activity Summary Report**

- Displays a summary of the aggregate Volume (Total Pieces), Discount Amount, and Total Postage associated to the program in real time
  - Shows how much you have saved up until that point in time

Activity Report

Activity is updated on a daily basis. Each mailing date reflects a daily total mailing activity.

Activity Summary

Totals					
Award Start Date	Award End Date	Threshold(pieces)	Volume(pieces)	Discount Amount	
05/17/2012	08/31/2012	0	2,000	(\$6.78)	
Total:			2,000	(\$6.78)	

- **Mail Owner Activity Detail Report**

- Displays a more detailed view aggregated by day and by permit so that each row represents daily total mailing activity for each permit
  - Information is separated into sections by mail class

Activity Report

Standard Mail

Mailing Start Date: \_\_\_\_\_ Mailing End Date: \_\_\_\_\_

Filter:

Mailing Date	Number of Postage Statements	Permit Info	Permit Type	Finance Number	Volume (pieces)	Discount Amount
06/21/2012	1	8	PI	51000	1,000	(\$3.94)
07/01/2012	1	78	PI	51000	1,000	(\$2.84)
Total:					2,000	(\$6.78)

Showing 1 to 2 of 2 entries

Reporting: Non-Earned Value

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Reports are updated nightly and if postage statements are submitted to PO! Pre-prod environment

# Non-Earned Value Reporting: MSP Activity Report



- **MSP Activity Summary Report**

- Displays an aggregate view of the Volume (Total Pieces), Discount Amount, and Total Postage associated to the program
- Data is refreshed near real-time for all statements that you are the mailing agent (Mail Owner)

Activity Summary

Award Start Date	Award End Date	Total Pieces	Discount Amount	Total Postage
05/17/2012	08/31/2012	2,000	(\$6.00)	\$332.22
Total:		2,000	(\$6.00)	\$332.22

Showing 1 to 1 of 1 entries

- **MSP Activity Detail Report**

- Displays a daily view based on each postage statement generated as the Mail Owner
  - Includes the mailing date, the CRID populated in the 'For' section of the eDoc, the company name associated to that CRID, and the permit information for the permit that got charged the final postage amount (permit in the Permit Holder field)

Detailed Activity

Mailing Start Date:  Mailing End Date:

Filter:

Mailing Date	CRID	Company	Permit Number	Permit Type	Total Pieces	Discount Amount	Total Postage
05/21/2012	XXXX796	CLIENT C	567	PI	1,000	(\$3.00)	\$193.06
07/01/2012	XXXX796	COMPANY A	781	PI	1,000	(\$2.00)	\$139.16
05/21/2012	XXXX796	COMPANY B	78	PI	1,000	(\$3.00)	\$193.06
07/01/2012	XXXX796	COMPANY A	781	PI	1,000	(\$2.00)	\$139.16

Showing 1 to 4 of 4 entries

Reporting: Non-Earned Value

# Agenda



- [Background Information](#)
- [Requesting Access to Incentive Programs](#)
- [Login to Pre-Prod Environment](#)
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 [Resources](#)

- For additional information, see:
  - Promotions and Incentive Programs documentation on RIBBS  
<https://ribbs.usps.gov/index.cfm?page=mailingpromotions>
  - July 2014 Release 38 Postal Service Technical Specifications  
[https://ribbs.usps.gov/intelligentmail\\_schedule2014/releases/july2014/techspecs.cfm](https://ribbs.usps.gov/intelligentmail_schedule2014/releases/july2014/techspecs.cfm)
  - July 2014 *PostalOne!* Release Notes  
[https://ribbs.usps.gov/intelligentmail\\_schedule2014/releases/july2014/releasenotes.cfm](https://ribbs.usps.gov/intelligentmail_schedule2014/releases/july2014/releasenotes.cfm)
  - Incentive Programs Service User Guide (for Mail Owners)  
<https://ribbs.usps.gov/index.cfm?page=mailingpromotions>

## APPENDIX

# Key Terminology



Term	Description
<b>Business Customer Gateway (BCG)</b>	A Web portal for USPS® business services <a href="http://gateway.usps.com">http://gateway.usps.com</a>
<b>Customer Registration ID (CRID)</b>	A unique ID for a company name and location combination. The CRID is automatically assigned when you select a Business Account
<b>Business Service Administrator (BSA)</b>	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