UNITED STATES POSTAL SERVICE®

Earned Value Incentive Program

User Guide

April 8th, 2015

Version: 5.0

Document Change History

This is the fifth version (5.0) 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 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.
Section 4 Enroll - Payment Accounts / Permit Accounts, pg. 21-22	Earned Value Incentive User Guide v3.0	Updated Permit Accounts to include Custom Mail Owner Permit Search
Section 2 – New Business Customer Gateway (BCG) Users, pgs. 7,9,10	Earned Value Incentive User Guide v3.0	Updated BCG screenshots.
Section 4 Enroll – Mailer IDs Tab, pg. 17	Earned Value Incentive User Guide v3.0	Updated MIDs screenshot.
Section 12: SPLY Earned Value Incentive	Earned Value Incentive User Guide v 5.0	Updated Reports

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/index.cfm?page=mailingpromotions
- May 2015 Release 41 Postal Service Technical Specifications
  https://ribbs.usps.gov/intelligentmail_schedule2015/releases/may2015/techspecs.cfm
- May 2015 *PostalOne!* Release Notes
  https://ribbs.usps.gov/intelligentmail_schedule2015/releases/may2015/releasenotes.cfm
- Incentive Programs Service User Guides
  https://ribbs.usps.gov/index.cfm?page=mailingpromotions
- 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

1. Navigate to the BCG: https://gateway.usps.com
2. Click on *Register for free*

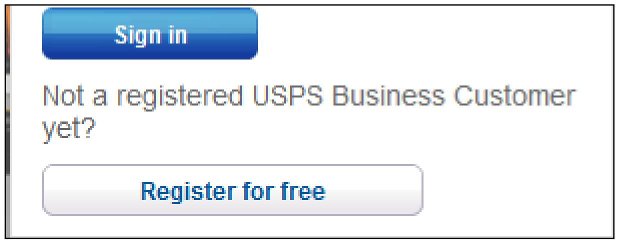


Figure 1: Register for Free

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.

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. Navigate to the BCG: https://gateway.usps.com
2. Enter your user name and password in the fields provided.

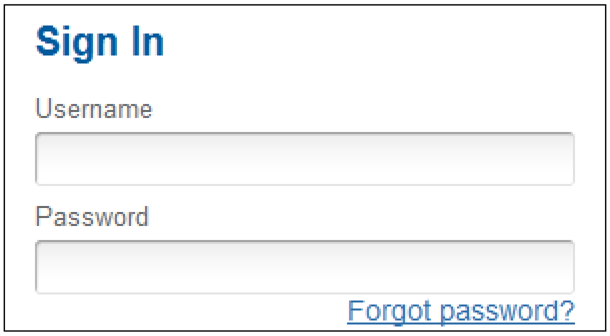


Figure 2: Sign in screen

4 Request Incentives Programs: New and Existing Users

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

1. Navigate to the BCG and sign in to display the Welcome Screen
2. Select Mailing Services from the menu to the left of the Welcome Screen.

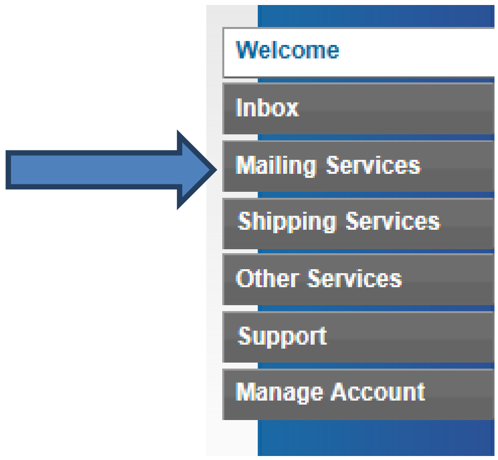


Figure 3: Click on Mailing Services

3. Select Incentive Programs from the list displayed and click on Get Access.

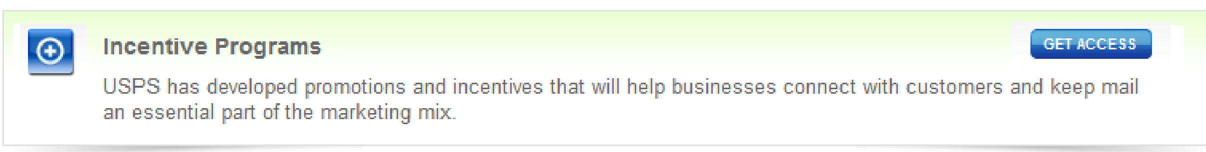


Figure 4: Incentive Programs

4. Verify all your Business Locations
   - Under Manage Account > Manage Services: Click on 

 button to manage your services by location 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.

5. Select all your Business Locations
   - Click the check box for all business locations that you would like to enroll and then click the 

 button.

6. Confirm your selection
   - Verify the accuracy of your locations and click the 

 button.

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

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 

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.

8. Become the Business Services Administrator (BSA) role for Incentive Programs
   - You are the BSA for Incentive Programs

   If you see the message shown below go to Select **an Incentive Program.**

Figure 5: BSA Access Granted

   If you do not see the message from above continue to get access to the Manage Mailing Activity service. Go to step below to become the BSA for Manage Mailing Activity.

9. You need approval from the BSA for Manage Mailing Activity

   If you see the message shown below (Figure 6), go to step below and: **Request Manage Mailing Activity** and follow all the steps. If you would like more information about why this step may be necessary, see the FAQ sheet.

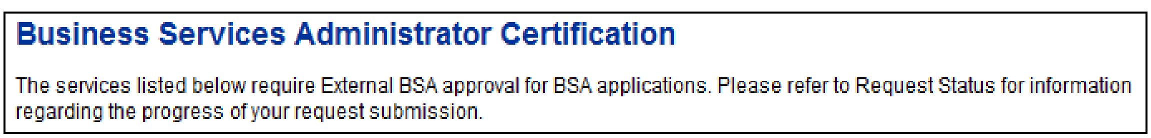


Figure 6: BSA Certification Required

10. Click on Manage Account

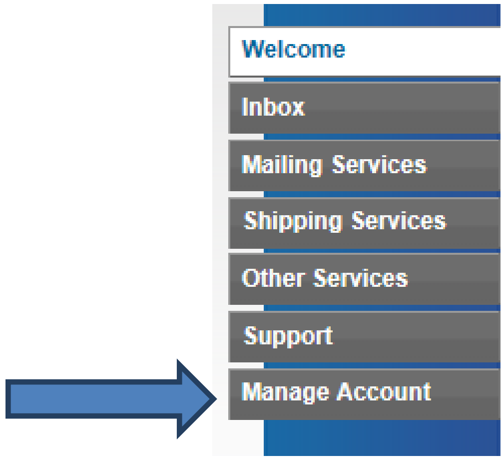


Figure 7: Manage Accounts

11. Request access to MMA

If you added new locations, 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 previously

12. 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.

5 Identify Yourself

1. From the Mailing Services page, select Incentive Programs.

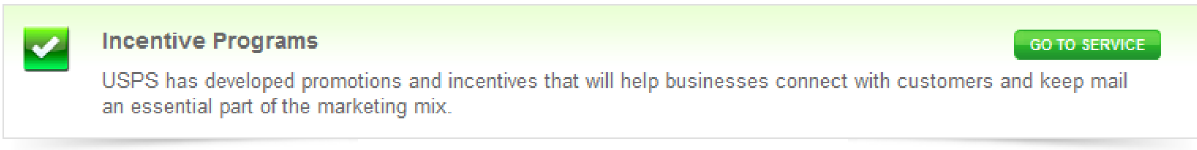


Figure 8: Incentive Programs service

6 Begin Enrollment

1. 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 9.

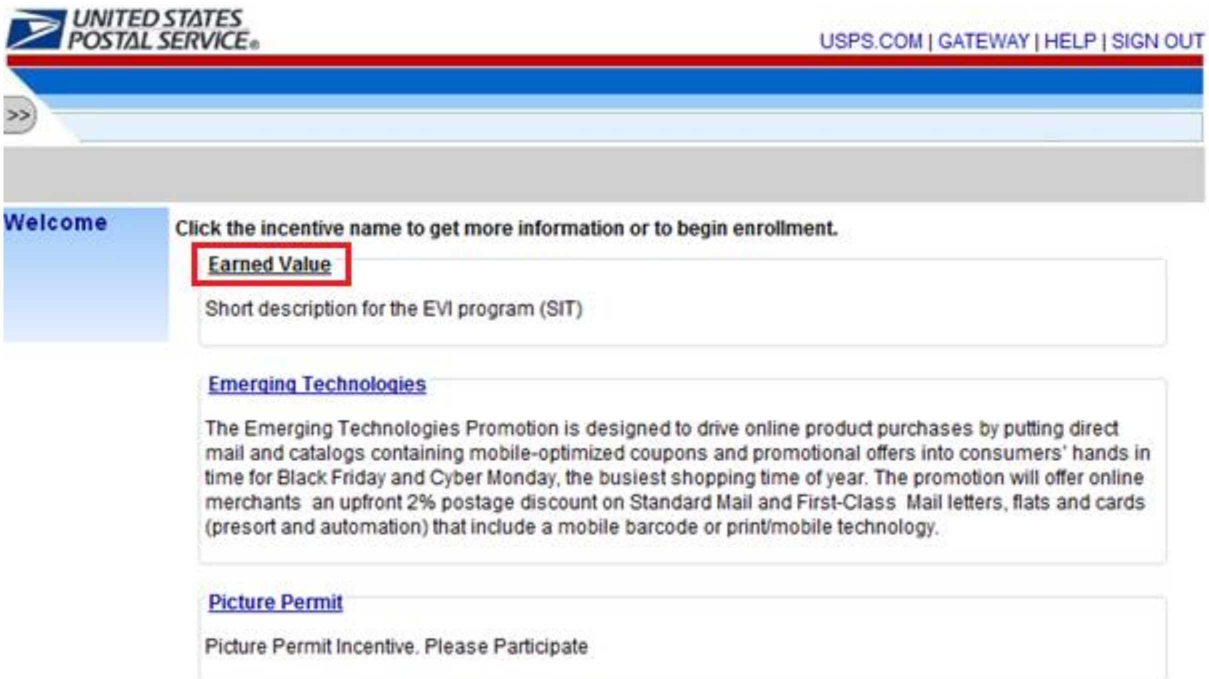


Figure 9: Incentive Program selection

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

3. Follow the Enrollment Tasks

Complete the Enrollment tasks by navigating within 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.

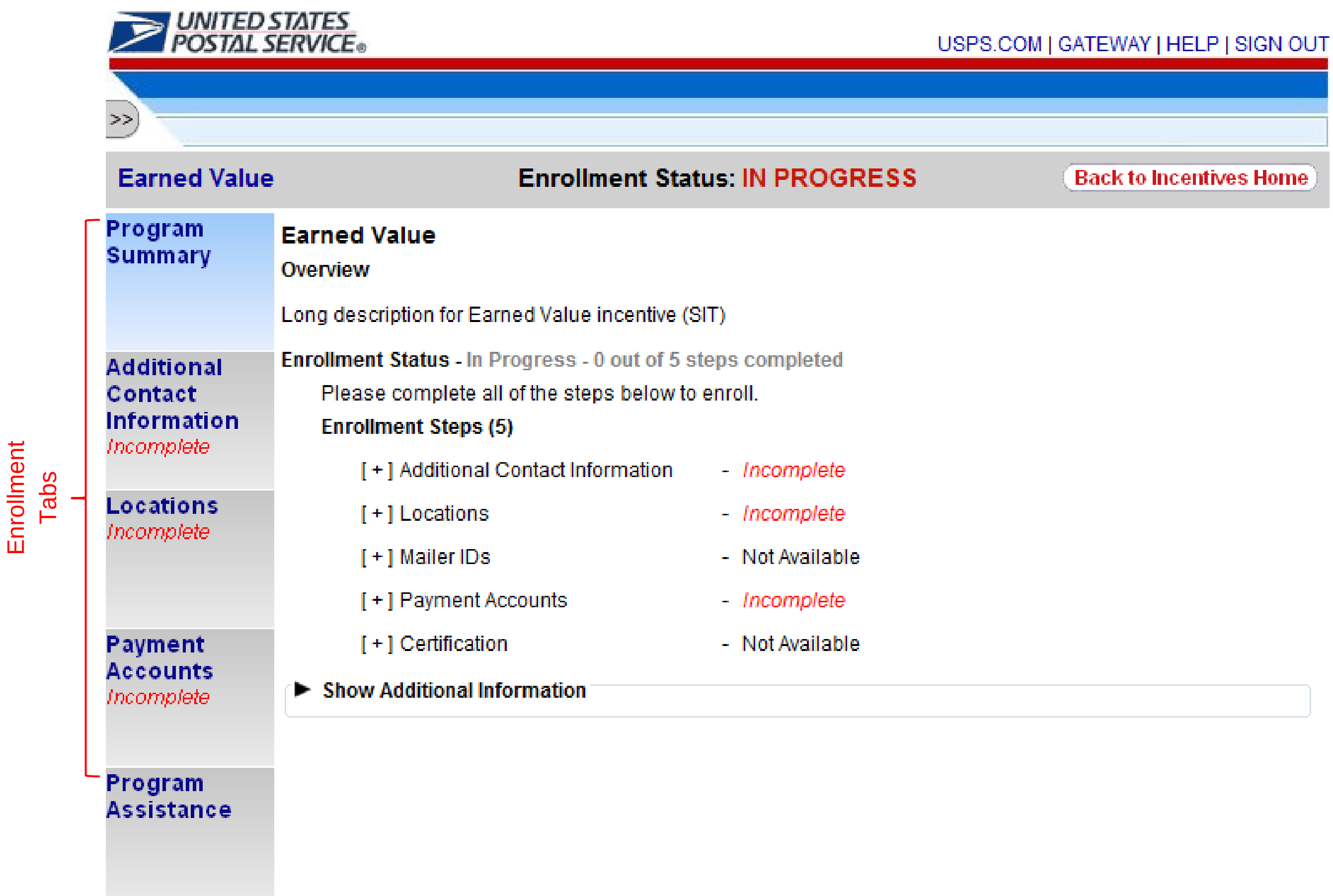


Figure 10: Enrollment tabs and Enrollment Status - In Progress

4. **Additional Contact Information Tab**

The Additional Contact Information page 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.

5. **Locations Tab**

The Locations page 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.

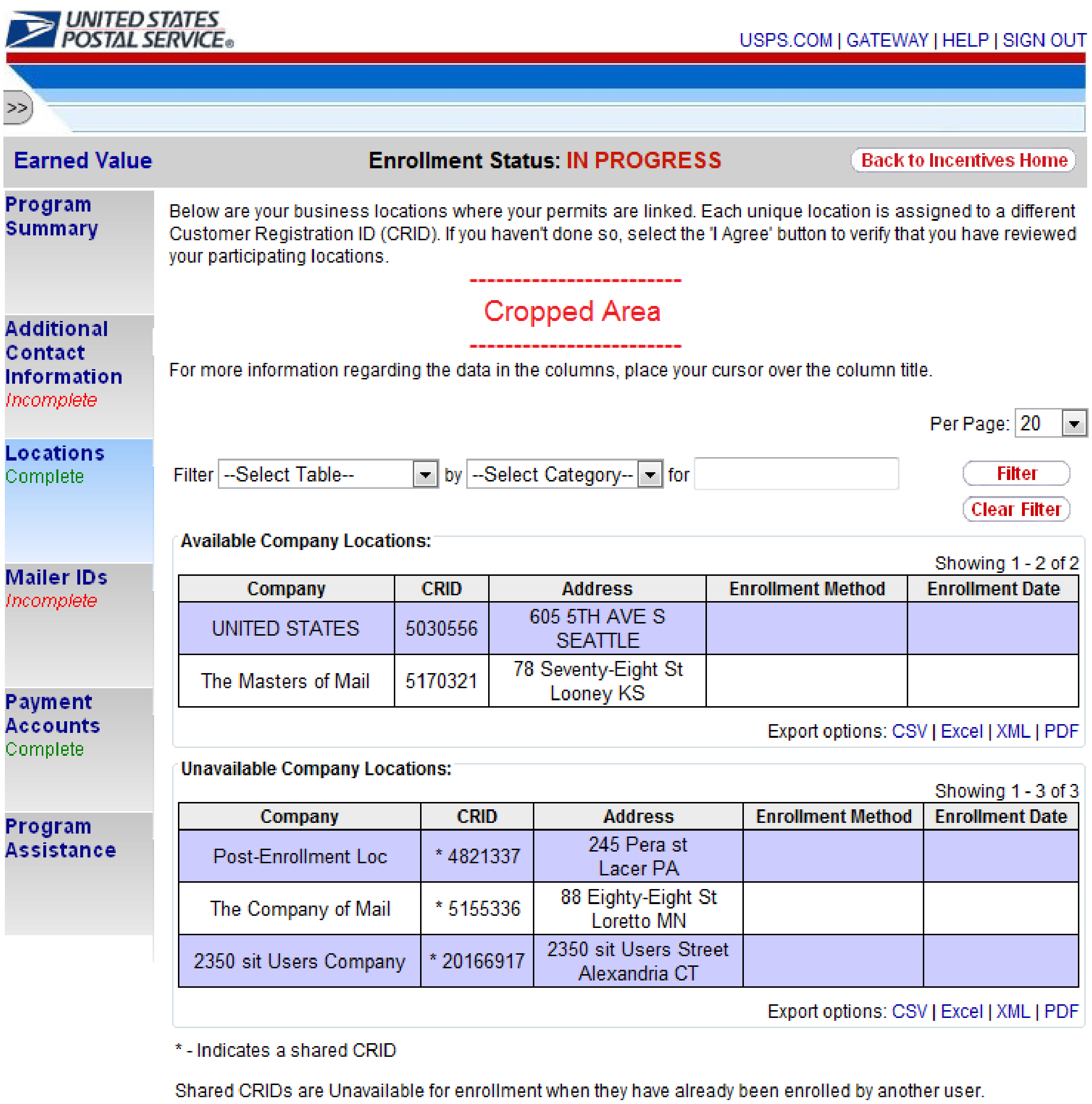
Post-Enrollment Changes

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.



UNITED STATES POSTAL SERVICE®

USPS.COM | GATEWAY | HELP | SIGN OUT

Earned Value — Enrollment Status: IN PROGRESS — Back to Incentives Home

Program Summary

Additional Contact Information *Incomplete*

Locations Complete

Mailer IDs *Incomplete*

Payment Accounts Complete

Program Assistance

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.

Cropped Area

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

Available Company Locations:

Showing 1 - 2 of 2

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		

Export options: CSV | Excel | XML | PDF

Unavailable Company Locations:

Showing 1 - 3 of 3

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		

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.

Figure 11: Available & Unavailable Company Locations

***The logged-in user shares some of their locations with another user who is already enrolled in the program. You will not get credit for CRIDs that have been previously registered by another user.**

7 Mailer IDs Tab

The Mailer IDs page will only become available once the Locations tab has been completed/agreed to. 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: you will need to enroll all CRIDs/locations where there are eligible Mailer IDs you plan to use for the promotion***.*** Only business locations registered for the Incentive Program's service will have their associated Mailer IDs displayed on the Mailer IDs page.

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 already been registered for the Incentive Program's service by multiple users. See Figure 12 and Figure 13.

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.

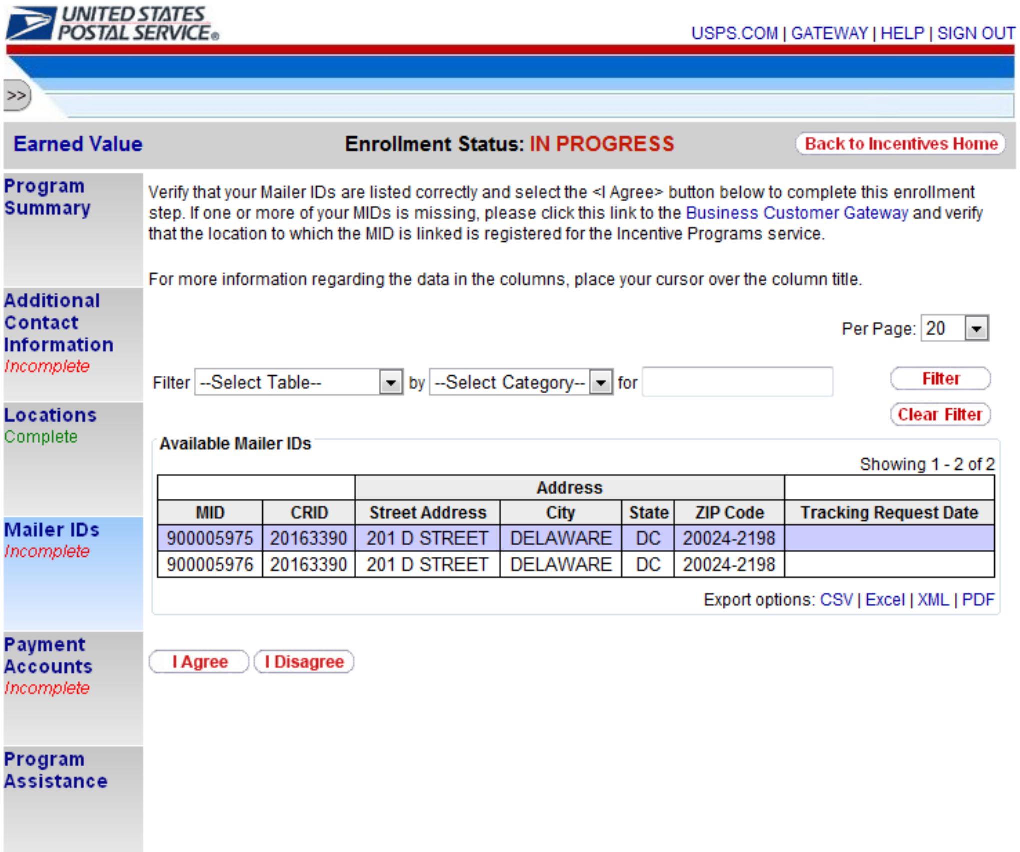
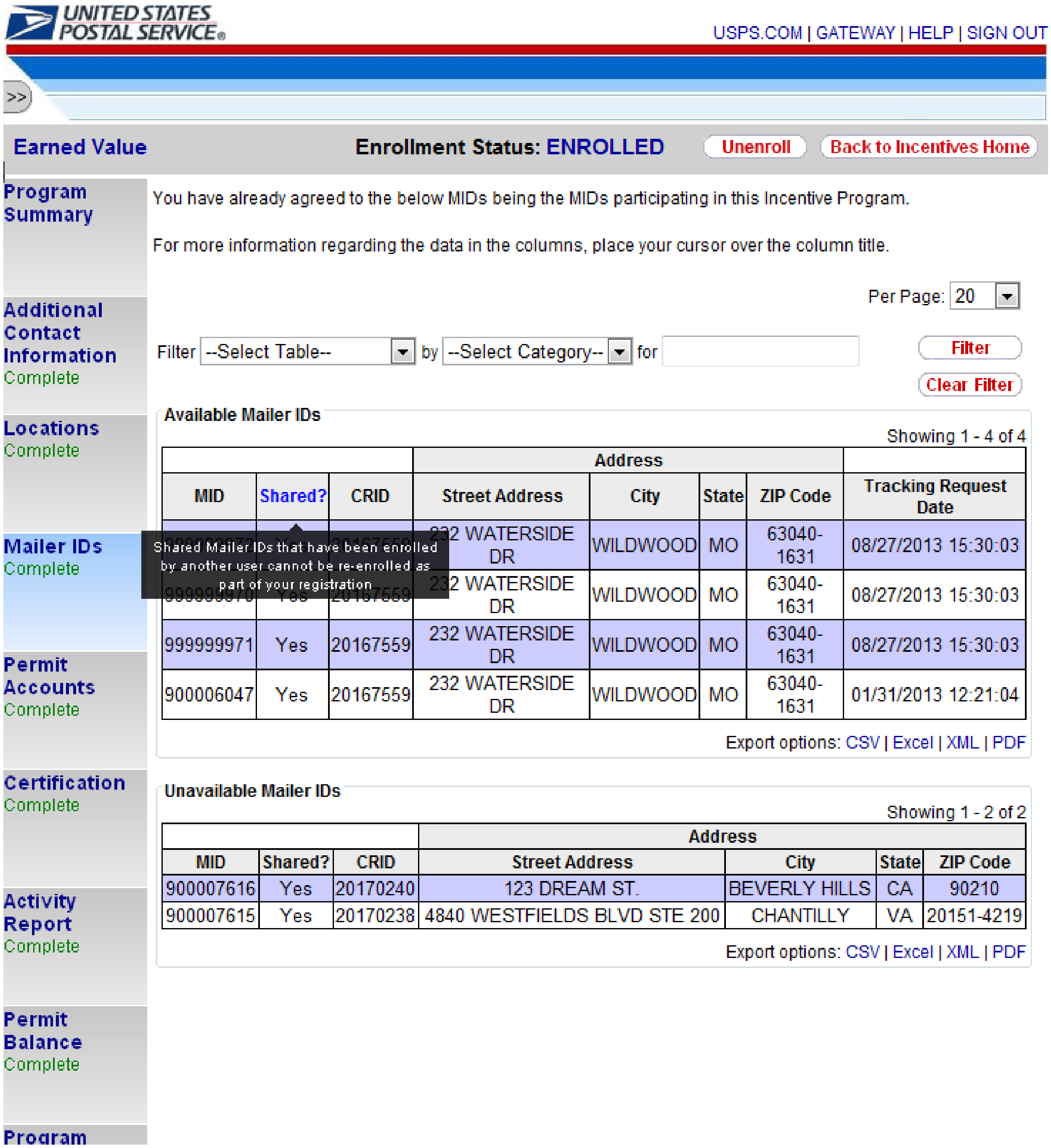


Figure 12: Mailer IDs page for users who do not share any business locations



			Address				
MID	Shared?	CRID	Street Address	City	State	ZIP Code	Tracking Request Date
[illegible]	[illegible]	[illegible]	232 WATERSIDE DR	WILDWOOD	MO	63040-1631	08/27/2013 15:30:03
[illegible]	[illegible]	[illegible]	232 WATERSIDE DR	WILDWOOD	MO	63040-1631	08/27/2013 15:30:03
999999971	Yes	20167559	232 WATERSIDE DR	WILDWOOD	MO	63040-1631	08/27/2013 15:30:03
900006047	Yes	20167559	232 WATERSIDE DR	WILDWOOD	MO	63040-1631	01/31/2013 12:21:04

Export options: CSV | Excel | XML | PDF

Unavailable Mailer IDs

Showing 1 - 2 of 2

			Address			
MID	Shared?	CRID	Street Address	City	State	ZIP Code
900007616	Yes	20170240	123 DREAM ST.	BEVERLY HILLS	CA	90210
900007615	Yes	20170238	4840 WESTFIELDS BLVD STE 200	CHANTILLY	VA	20151-4219

Export options: CSV | Excel | XML | PDF

Figure 13: Mailer IDs - User shares some business locations

8 Payment Accounts Tab

The Payment Accounts tab allows you to review the permits that are associated to your registered business locations. If a permit is added to one of your participating CRIDs, you must wait 30 minutes for the new permit to display on the page. In order to use the credit accrued during the program, you will must use your selected permit/permits to pay for postage when claiming the incentive in the postage statement. You must verify the accuracy and completeness of the permits so that you will be able to use the credit you accrued during the incentive. Once you have verified your permits, you must finalize your permit selections before the award claim period begins. You can do so by clicking on the <I Agree> button.

Selecting Multiple Permits

You can select one or more permits to split your credit by allocating percentage values to each permit. You may select an eligible or custom permit. To assign a percentage value to a single permit or multiple permits: click on the <Add> button displayed under the Eligible Permits table. See Figure 14

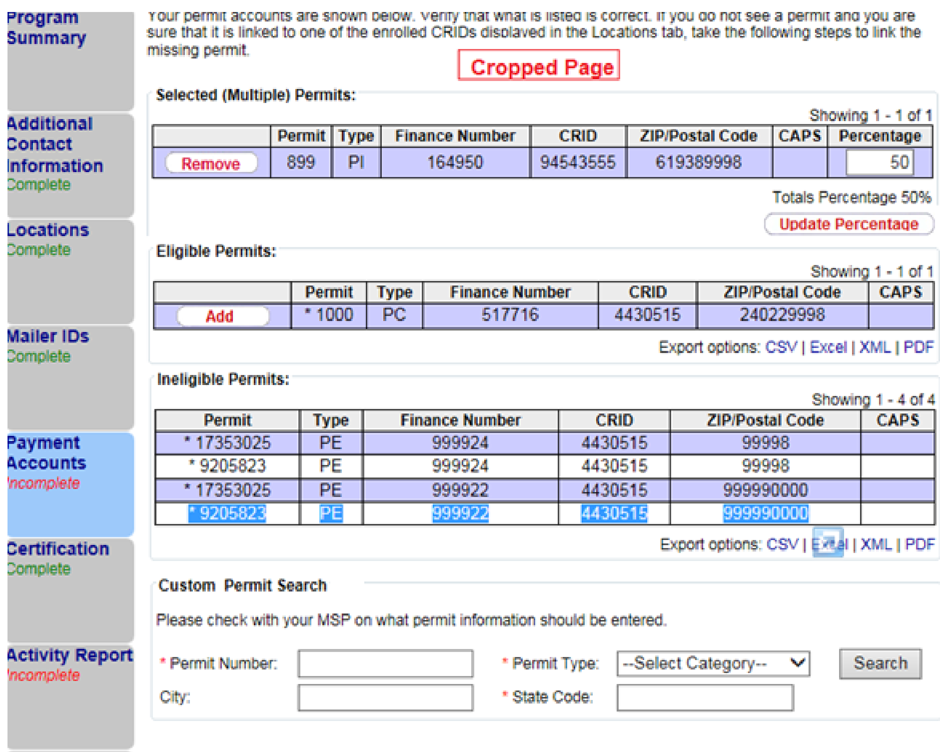
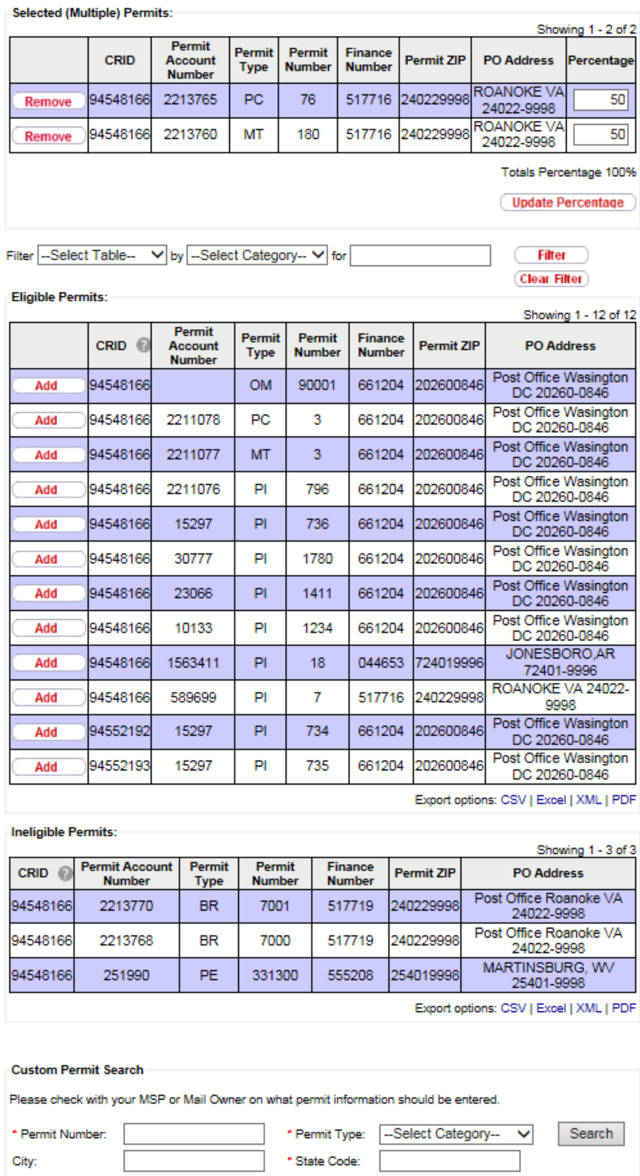


Figure 14: Add Eligible Permit

Changing my selected permit – Eligible Permits

You can change the selected eligible or custom permit at any time up until the start of the Award Claim Period. To change your permit percentage allocation click on the <Remove> button. Be sure to click on the <I Agree> button once you make your changes.

Note: Once the Award Claim Period has begun, your permit and credit allocation is sent to PostalOne! and cannot be changed.



Selected (Multiple) Permits:

Showing 1 - 2 of 2

	CRID	Permit Account Number	Permit Type	Permit Number	Finance Number	Permit ZIP	PO Address	Percentage
Remove	94548166	2213765	PC	76	517716	240229998	ROANOKE VA 24022-9998	50
Remove	94548166	2213760	MT	180	517716	240229998	ROANOKE VA 24022-9998	50

Totals Percentage 100%

Update Percentage

Filter --Select Table-- by --Select Category-- for Filter Clear Filter

Eligible Permits:

Showing 1 - 12 of 12

	CRID	Permit Account Number	Permit Type	Permit Number	Finance Number	Permit ZIP	PO Address
Add	94548166		OM	90001	661204	202600846	Post Office Wasington DC 20260-0846
Add	94548166	2211078	PC	3	661204	202600846	Post Office Wasington DC 20260-0846
Add	94548166	2211077	MT	3	661204	202600846	Post Office Wasington DC 20260-0846
Add	94548166	2211076	PI	796	661204	202600846	Post Office Wasington DC 20260-0846
Add	94548166	15297	PI	736	661204	202600846	Post Office Wasington DC 20260-0846
Add	94548166	30777	PI	1780	661204	202600846	Post Office Wasington DC 20260-0846
Add	94548166	23066	PI	1411	661204	202600846	Post Office Wasington DC 20260-0846
Add	94548166	10133	PI	1234	661204	202600846	Post Office Wasington DC 20260-0846
Add	94548166	1563411	PI	18	044653	724019996	JONESBORO,AR 72401-9996
Add	94548166	589699	PI	7	517716	240229998	ROANOKE VA 24022-9998
Add	94552192	15297	PI	734	661204	202600846	Post Office Wasington DC 20260-0846
Add	94552193	15297	PI	735	661204	202600846	Post Office Wasington DC 20260-0846

Export options: CSV | Excel | XML | PDF

Ineligible Permits:

Showing 1 - 3 of 3

CRID	Permit Account Number	Permit Type	Permit Number	Finance Number	Permit ZIP	PO Address
94548166	2213770	BR	7001	517719	240229998	Post Office Roanoke VA 24022-9998
94548166	2213768	BR	7000	517719	240229998	Post Office Roanoke VA 24022-9998
94548166	251990	PE	331300	555208	254019998	MARTINSBURG, WV 25401-9998

Export options: CSV | Excel | XML | PDF

Custom Permit Search

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

* Permit Number: * Permit Type: --Select Category-- Search

City: * State Code:

Figure 15: Remove Permit (Picture is Cropped)

Ineligible Permits

Based on the permit types allowed by the incentive program, your permits will be sorted as eligible or ineligible. 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).

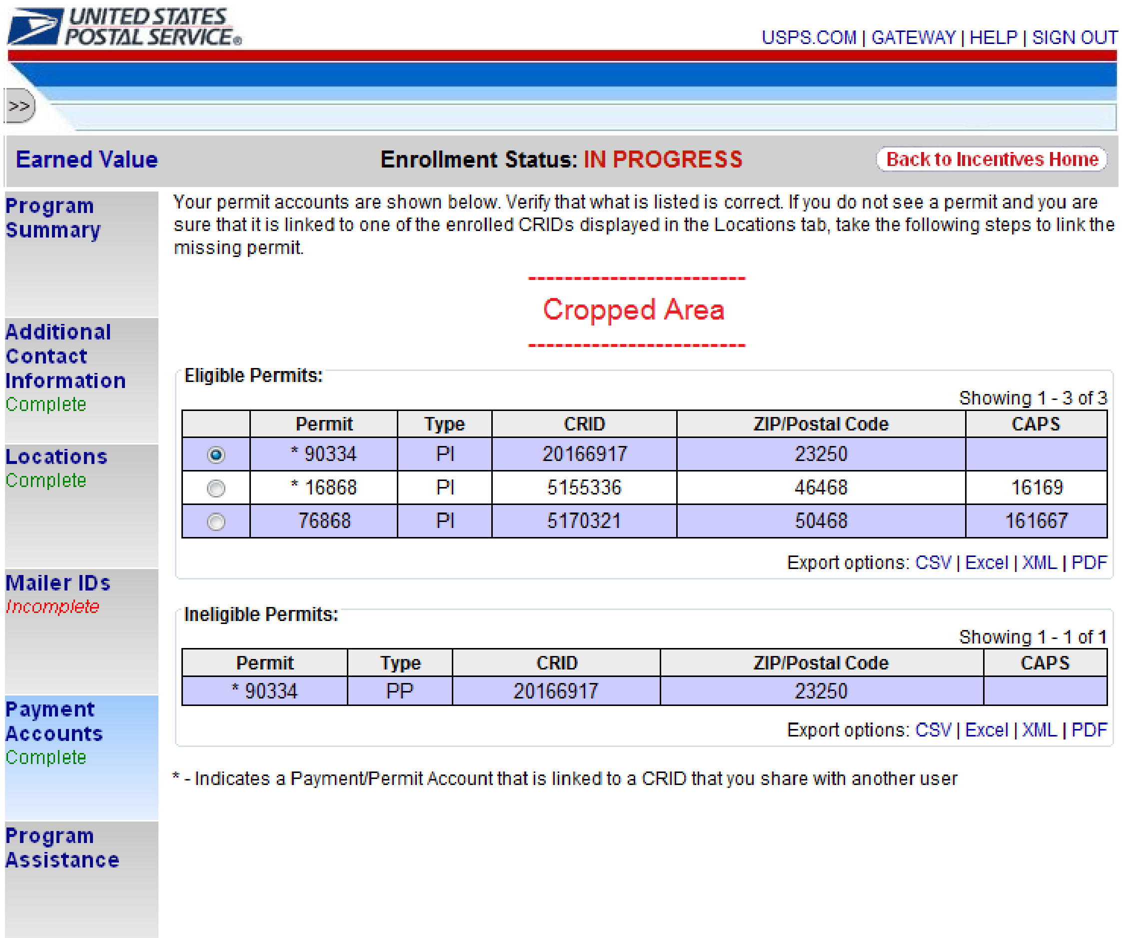


Figure 16: Ineligible Permits

Custom Permit Search

The Custom Permit Search is available for mailers who would like to disperse their credit amount to a permit that is outside their profile. Once the credit is released to the permit user will be unable to move the credit to another permit. A permit can be selected up until the start of the Award Claim Period (as determined by the program office). The Permit Number, Permit Type, and State Code are denoted as required fields; the City is optional for the user to enter.

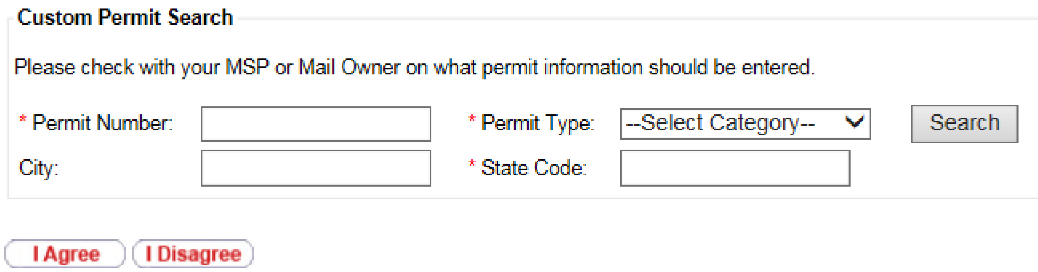
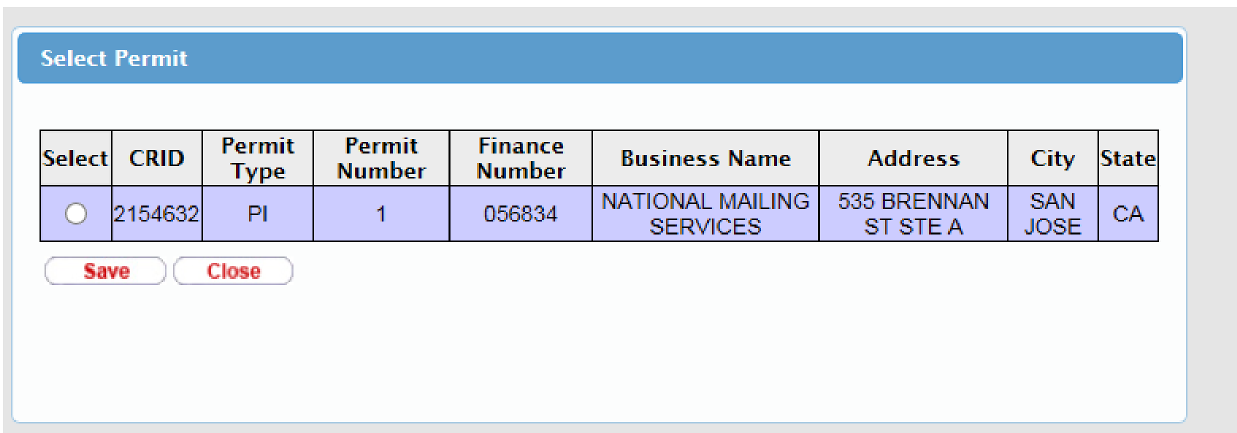


Figure 17: Custom Permit Search

Once a Permit is searched for, a “Select 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 Permit will receive the credit by clicking <Save>. Then the pop-up window will close and the Permit table will be populated with your selection on the Selected (Multiple) permits table.


Select Permit

Select	CRID	Permit Type	Permit Number	Finance Number	Business Name	Address	City	State
○	2154632	PI	1	056834	NATIONAL MAILING SERVICES	535 BRENNAN ST STE A	SAN JOSE	CA

Save Close

Figure 18: Selecting a custom permit

9 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 26.

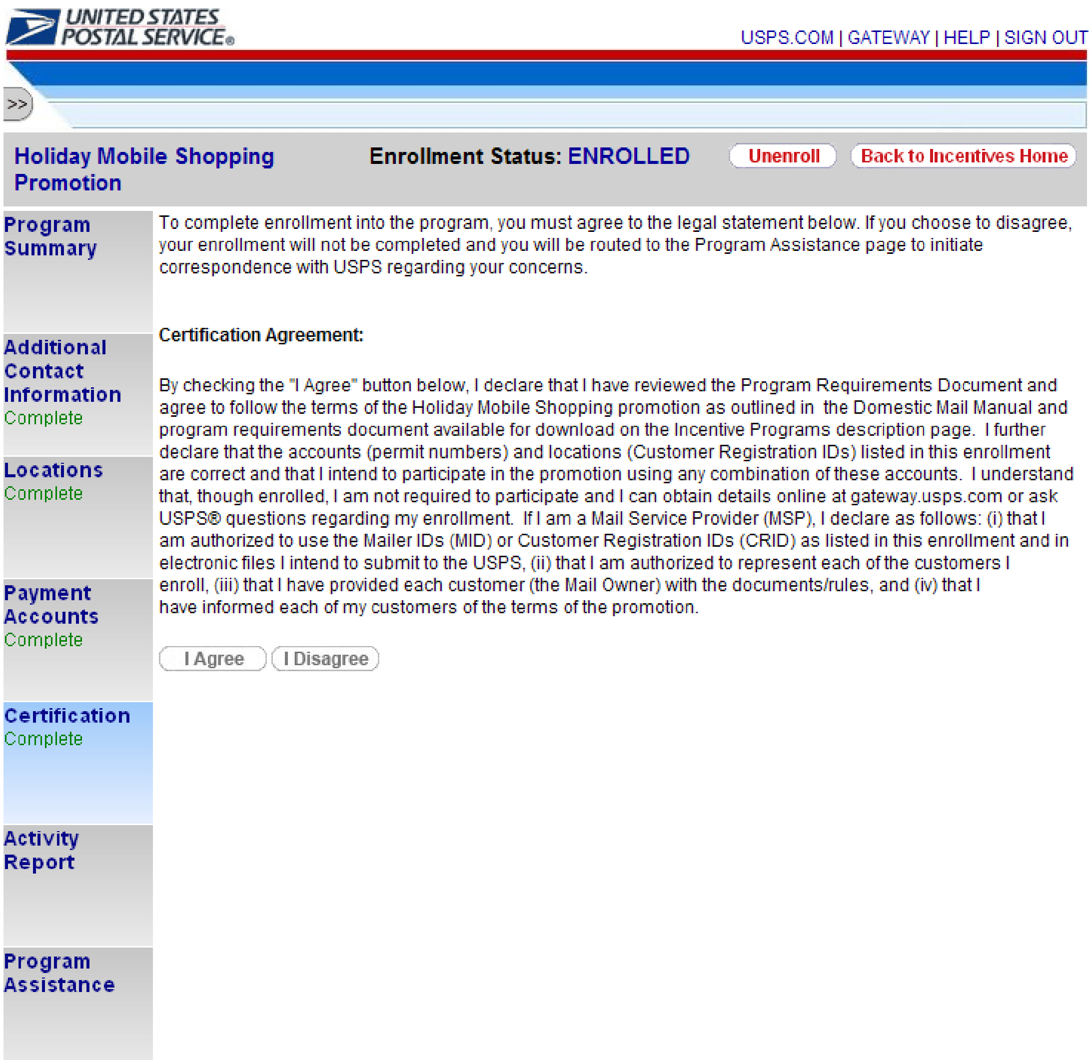


Figure 19: Certification Tab

10 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 4, 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.

11 Reporting: For Non- SPLY Earned Value Incentives.

The reports described below will display for customers who enroll in an earned value incentive that does not provide an additional incentive for previous year participation.

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. You will have to agree to the volume and credit acquired in order to receive the credit.

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, displays the percentage allocated to the permits and credit amount. This information will update automatically if you decide to change your percentage allocation on the payment accounts tab.

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

Figure 20: Permit Number and Percentage allocation

Earned Value Summary

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 are defined by the Program office.]

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

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

Figure 21: 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.

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		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	CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces								
20400413	Company A	900008256					148	448	1,048	2,048		3,448	1,196	5,944	-20	0	1,176	5,944	$1,176.00	$297.20
20499224	Company B	900008303		296		1,359		2,371		202		1,064	0	5,292	30	60	30	5,352	$30.00	$267.60

Figure 22: Earned Value Detail

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 30.

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.

					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
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

Figure 23: 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 24: 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.

12 Reporting: For SPLY Earned Value Incentives.

The reports described below will display for customers who enroll in 2 earned value incentives consecutively. Starting 2015 the earned value incentive will provide an additional incentive to mailer who enrolled in the previous earned value program. Enrollment will remain the same however the Activity report will display additional columns. No changes have been made to the permit balance report.

Activity Report

The top section of the Activity Report, displays the percentage allocated to the permits and credit amount. This information will update automatically if you decide to change your percentage allocation on the payment accounts tab.

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

Figure 25: Permit Number and Percentage allocation

Earned Value Summary

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 are defined by the Program office.]

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

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

Figure 26: 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.

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

CRID	Company	MID	Previous Total Count	Current Total Count	Growth %	Credit Per Piece	Mar-15 CRM	Mar-15 BRM	Total CRM Pieces	Total BRM Pieces	Total CRM Piece	Total BRM Piece Adjust	Net CRM Pieces	Net BRM Pieces	CRM Total Credit	BRM Total Credit
4430796	AUTOMATED MAILING !	100017	4,000	200,000	4,900.00	$0.03	0	0	0	0	100,000	100,000	100,000	100,000	$3,000.00	$3,000.00
4430796	AUTOMATED MAILING !	100019	200,000	300,000	50	$0.03	0	0	0	0	150,000	150,000	150,000	150,000	$4,500.00	$4,500.00
4430796	AUTOMATED MAILING !	100021	200,000	100,000	-50	$0.02	0	0	0	0	50,000	50,000	50,000	50,000	$1,000.00	$1,000.00
4430796	AUTOMATED MAILING !	100022	200,000	200,000	0	$0.03	0	0	0	0	100,000	100,000	100,000	100,000	$3,000.00	$3,000.00
4430796	AUTOMATED MAILING !	100023	200,000	1,800,000	800	$0.05	0	0	0	0	900,000	900,000	900,000	900,000	$45,000.00	$45,000.00
4430796	AUTOMATED MAILING !	200075	0	200,000	n/a	$0.02	0	0	0	0	100,000	100,000	100,000	100,000	$2,000.00	$2,000.00
4430796	AUTOMATED MAILING !	900000395	0	200,000	n/a	$0.02	0	0	0	0	100,000	100,000	100,000	100,000	$2,000.00	$2,000.00
4430796	AUTOMATED MAILING !	900000451	0	200,000	n/a	$0.02	0	0	0	0	100,000	100,000	100,000	100,000	$2,000.00	$2,000.00

Figure 27: Earned Value Detail Report Section

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.

Previous Total Count: The cumulative number of BRM and CRM pieces you mailed in the previous earned value incentive

Current Total Count: The cumulative number of BRM and CRM pieces you mailed in the current earned value promotion.

Growth %: Growth percentage is calculated based on your total presence piece count divided by past years piece counts.

Credit Per Piece: The credit per piece you will receive for a specific MID.

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.

13 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).

14 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. Step 1.7.2 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. Step 2.3 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. Step 3.1 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. <u>Step 4</u> Enroll

<u>Program Registration Landing Page</u>

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.

<u>Locations Page</u>

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.