### Document Change History

This is the sixth version (6.0) of the Earned Value Incentive Program User Guide.

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Introduction</td>
<td>Updated hyperlinks</td>
</tr>
</tbody>
</table>

This is the third version (3.0) of the Earned Value Incentive Program User Guide.

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Earned Value Incentive User Guide</td>
<td>Initial Draft</td>
</tr>
<tr>
<td>All</td>
<td>Earned Value Incentive User Guide</td>
<td>Reviewed/Edited v1.0 of draft</td>
</tr>
<tr>
<td>Section 5 Reporting – Activity Report, pg. 23</td>
<td>Earned Value Incentive User Guide</td>
<td>Notes added for Total CRM Adjustment &amp; Total BRM Adjustment</td>
</tr>
<tr>
<td>Section 4 Enroll – Payment Accounts, pg. 17</td>
<td>Earned Value Incentive User Guide</td>
<td>Updated Payment Accounts to include Custom MSP Permit Search</td>
</tr>
<tr>
<td>Section 1.1 Additional Assistance, pg. 4; Section 3 – Identify Yourself, pg. 9</td>
<td>Earned Value Incentive User Guide</td>
<td>Updated Additional Assistance; Identify Yourself based on business feedback</td>
</tr>
<tr>
<td>Section 8</td>
<td>Earned Value Incentive User Guide</td>
<td>Added scenarios for MSP and mail owner enrollment.</td>
</tr>
<tr>
<td>Section 4 Enroll - Payment Accounts / Permit Accounts, pg. 21-22</td>
<td>Earned Value Incentive User Guide v3.0</td>
<td>Updated Permit Accounts to include Custom Mail Owner Permit Search</td>
</tr>
<tr>
<td>Section 4 Enroll – Mailer IDs Tab, pg. 17</td>
<td>Earned Value Incentive User Guide v3.0</td>
<td>Updated MIDs screenshot.</td>
</tr>
</tbody>
</table>
# Table of Contents

1. **Introduction** .......................................................... 4  
   1.1 **Additional Assistance** ........................................... 4  
   1.2 **Document Conventions** ......................................... 4  
   1.3 **Key Terminology** .................................................. 4  
2. **New Business Customer Gateway (BCG) Users** .......................... 5  
3. **Steps for Existing Business Customer Gateway (BCG) Users** ............... 6  
4. **Request Incentives Programs: New and Existing Users** ....................... 7  
5. **Identify Yourself** ..................................................... 10  
6. **Begin Enrollment** .................................................... 13  
7. **Mailer IDs Tab** ....................................................... 16  
8. **Payment Accounts Tab (for Mail Owners) / Permit Accounts (for MSPs)** .... 19  
9. **Certification Tab** ..................................................... 26  
10. **Post-enrollment Scenarios** .......................................... 27  
11. **Reporting** ........................................................... 28  
12. **Frequently Asked Questions (FAQ)** .................................. 33  
13. **Troubleshooting** .................................................... 35  
14. **Enrollment Scenarios** .............................................. 38
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

- April 2012 Release 31 Postal Service Technical Specifications

- April 2012 PostalOne! Release Notes

- Incentive Programs Service User Guide (for Mail Owners)

- 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


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.

![Sign In Form](figure2.png)

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.
3. Select Incentive Programs from the list displayed and click on Get Access.
4. Verify all your Business Locations
   - Under Manage Account > Manage Services: Click on the 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 Yes button.

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

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.

   ![Business Service Administrator (BSA) Access Granted](image)

   **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.

   ![Business Services Administrator Certification](image)

   **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.

![Incentive Programs]

**Figure 8 Incentive Programs**

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

Correctly identifying yourself is important for several reasons. Select Mail Owner if you plan to prepare and tender your own mail to the USPS when claiming the incentive. Select Mail Service Provider if you are a mailing agent for mail owners. Refer to Figure 9.

![Identify Yourself]

**Figure 9: Identify Yourself**

3. Verify your mailer identity

Select the *double-arrow* button to expand a pop-up that displays your user’s profile information. Use it to verify that you have identified yourself correctly. Refer to Figure 10.
It is important that you verify that you have correctly identified yourself. To do this, look at the identity label displayed in the pop-up right above the Process Start Date. In the example from Figure 12 below, the user has identified himself as a “Mail Service Provider”.

Figure 10: Click on double arrow

Figure 11: User Profile info displayed
Figure 12: User Profile shown as Mail Service Provider

If you need to change your identity, use the link that is next to the identity label. In Figure 12, the link reads “Not a MSP?” in parenthesis. Select this link and you will be directed back to the Identify Yourself screen where you can modify your selection.

Modifying your identity after you are enrolling/enrolled in a program will reset the enrollment process and you will need to re-enroll if you wish to continue claiming the Earned Value credit. Your status will revert back to “AVAILABLE”.
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 13.

![Incentive Program Selection](image)

**Figure 13: Incentive Program Selection**

2. Select the Begin Enrollment button

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

3. Follow the Enrollment Tasks

Complete the Enrollment tasks by using the tabs located on the left-hand side of the page, or by clicking the links associated with each step. As you complete each task, the system will display the task as “Complete”. Some Enrollment tasks become available only after other tasks have been completed. Refer to Figure 14.
4. Additional Contact Information Tab

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

5. Locations Tab

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

Post-Enrollment Changes

If you associate new locations to the Incentive Programs service after you have completed enrollment in a program, these locations will not be automatically enrolled in the program. To enroll these new locations in the programs for which you are already enrolled, you must select the Incentive Programs link as described in section 3.
You will want to enroll all CRIDs/locations for which there are eligible Mailer IDs you plan to use for the promotion. If CRIDs are missing, the Mailer IDs associated to these CRIDs will not be enrolled in the program and you will not receive any credit for CRM/BRM volume associated to them. The system will NOT recognize the Mailer IDs as enrolled and will NOT track their volume.

**Unavailable Company Locations**

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

![Figure 15: Unavailable Location](image)

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

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

Unavailable Mailer IDs

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

Adding a Mailer ID post-agreement

If a Mailer ID is added to one of your participating CRIDs after you have already agreed to the list presented in the Mailer IDs tab and you want it to participate in the program, you must refresh your list of MIDs. To do this, you must return to the MIDs tab and follow the steps indicated on the page.
Figure 16: Mail ID Tab for users who do not share business locations
Figure 17: Mailer ID: User shares some business locations.
8 Payment Accounts Tab (for Mail Owners) / Permit Accounts (for MSPs)

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 have to wait 30 minutes for the new permit to display on the page. In order to use the credit accrued during the program, you will have to 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 18
Changing my selected permit – Eligible Permits

You can change the selected eligible or custom permit at any time up to 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. See Figure 19

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

Figure 19: Remove Permit
Ineligible Permits

Based on the permit types allowed by the incentive program, your permits will be sorted as eligible or ineligible as shown in Figure 20 below. For the Earned Value Incentive Program, the only eligible permits are Metered (MT), Precanceled (PC), Permit Imprint (PI), OMAS Imprint (OI), and OMAS Metered (OM).

![Ineligible Permits](image)

**Figure 20: Ineligible Permits**

Custom MSP Permit Search

The Custom MSP Permit Search is available to Mail Owners in order to search for and retrieve MSP permits the credit will be applied to. A MSP permit can be selected up until the start of the Award Claim Period (as determined on the internal console). The Permit Number, Permit Type, and State Code are denoted as required fields; the City is optional for the user to enter. Figure 21.
Once a MSP Permit is searched for, a “Select MSP Permit” pop-up will display the Permit Number, Permit Type, Finance Number, City, State, CRID, Business Name, and Address of the company. The user can select which MSP Permit will receive the credit by clicking <Save>. Then the pop-up window will close and the MSP Permit table will be populated with your selection on the Payment Accounts screen with the following fields: Permit Number, Permit Type, CRID, ZIP/Postal Code, and CAPS info. Figures 22 and 23 below.

**Figure 21: Custom MSP Permit Search**
**Figure 22: Selecting a custom permit**

<table>
<thead>
<tr>
<th>Select</th>
<th>Permit Number</th>
<th>Permit Type</th>
<th>Finance Number</th>
<th>City</th>
<th>State</th>
<th>CRID</th>
<th>Business Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>●</td>
<td>1234</td>
<td>PI</td>
<td>357485</td>
<td>Guangzhou</td>
<td></td>
<td></td>
<td>ChinaAcct</td>
<td>122 Liu Hua Lu</td>
</tr>
<tr>
<td>●</td>
<td>1234</td>
<td>PI</td>
<td>661204</td>
<td>WASHINGTON</td>
<td>DC</td>
<td>20165122</td>
<td>PROGR E_ G CAT 5</td>
<td>5 CAT St</td>
</tr>
<tr>
<td>●</td>
<td>1234</td>
<td>PI</td>
<td>999999</td>
<td>MEMPHIS</td>
<td>TN</td>
<td>20165246</td>
<td>NCSC 2</td>
<td>8980 PRIMACY PKWY STE 251</td>
</tr>
</tbody>
</table>
Custom Mail Owner Permit Search

Custom Mail Owner Permit Search is available to MSPs in order to search for and retrieve Mail Owner permits the credit will be applied to. A Mail Owner permit can be selected/modified until the credit is released for the selected permits. The Permit Number, Permit Type, and State Code are denoted as required fields; the City is optional for the user to enter. Figure 24

Once a Mail Owner 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 Mail Owner Permit will receive the credit by clicking <Save>. Then the pop-up window will close and the Mail Owner Permit table will be populated with your selection on the Permit Accounts screen with the following fields: Permit Number, Permit Type, CRID, ZIP/Postal Code, and CAPS info. Figure 25 below.
Figure 25: Custom Mail Permit Search Results
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 26: Certification Tab](image-url)
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

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

The Activity Report section provides both a high-level and a detailed view of volume and earned credit from returned Business Reply Mail (BRM) and Courtesy Reply Mail (CRM) pieces. It lets you know where your earned credit is coming from. 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. Refer to Figure 27

![Figure 27: Permit Number and Percentage allocation](image)

<table>
<thead>
<tr>
<th>Permit Number</th>
<th>Permit Type</th>
<th>Finance Number</th>
<th>Percent Allocated</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>42</td>
<td>PI</td>
<td>517716</td>
<td>50%</td>
<td>$1,111.11</td>
</tr>
<tr>
<td>81</td>
<td>PI</td>
<td>517716</td>
<td>50%</td>
<td>$1,111.11</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total Available Credit $2,222.22</td>
</tr>
</tbody>
</table>

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.
The bottom section, Earned Value Detail Report, provides a detailed view by Mailer ID (MID). Each row represents a different MID for which it displays the total returned volume broken down into CRM and BRM pieces by month. Refer to Figure 29.

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

**Figure 29: Earned Value Detail**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>20400413</td>
<td>Company A</td>
<td>900008256</td>
<td>148</td>
<td>448</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20499224</td>
<td>Company B</td>
<td>900008303</td>
<td>296</td>
<td>1,359</td>
<td>2,371</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Permit Number</th>
<th>Permit Type</th>
<th>Finance Number</th>
<th>Credit Acquired</th>
<th>Credit Used</th>
<th>Number Of Postage Statements</th>
<th>Credit Balance</th>
<th>Date and Time Credit Released</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Mailers</td>
<td>42</td>
<td>P</td>
<td>517716</td>
<td>$1,111.11</td>
<td>(500.00)</td>
<td>1</td>
<td>0</td>
<td>11/14/2013 13:44</td>
</tr>
<tr>
<td>Core Mailers</td>
<td>81</td>
<td>P</td>
<td>517716</td>
<td>$1,111.11</td>
<td>(5151.11)</td>
<td>1</td>
<td>0</td>
<td>11/19/2013 8:34</td>
</tr>
</tbody>
</table>

Figure 30: 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.

<table>
<thead>
<tr>
<th>Mailing Date</th>
<th>Postage Statement Seq. Number</th>
<th>Mail Class</th>
<th>Total Adjusted Postage</th>
<th>Total Pieces</th>
<th>Incentive Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/12/2012</td>
<td>5200438</td>
<td>SM</td>
<td>$159,154.14</td>
<td>650,105</td>
<td>-5.98</td>
</tr>
<tr>
<td>12/12/2012</td>
<td>5200439</td>
<td>SM</td>
<td>$70,805.94</td>
<td>300,109</td>
<td>-5.98</td>
</tr>
<tr>
<td>12/12/2012</td>
<td>5205457</td>
<td>SM</td>
<td>$40</td>
<td>1</td>
<td>-5.98</td>
</tr>
<tr>
<td>12/12/2012</td>
<td>5205475</td>
<td>FC</td>
<td>$34.87</td>
<td>94</td>
<td>-5.98</td>
</tr>
<tr>
<td>12/12/2012</td>
<td>5205480</td>
<td>FC</td>
<td>$34.87</td>
<td>94</td>
<td>-5.98</td>
</tr>
<tr>
<td>12/12/2012</td>
<td>5205695</td>
<td>FC</td>
<td>$228.66</td>
<td>980</td>
<td>-5.98</td>
</tr>
<tr>
<td>12/12/2012</td>
<td>5224673</td>
<td>SM</td>
<td>$1,078.64</td>
<td>5,474</td>
<td>-5.98</td>
</tr>
<tr>
<td>12/12/2012</td>
<td>5224720</td>
<td>SM</td>
<td>$364.32</td>
<td>0</td>
<td>-5.98</td>
</tr>
<tr>
<td>12/12/2012</td>
<td>5224722</td>
<td>SM</td>
<td>$160.43</td>
<td>0</td>
<td>-5.98</td>
</tr>
<tr>
<td>12/12/2012</td>
<td>5224733</td>
<td>SM</td>
<td>$8.40</td>
<td>4</td>
<td>-5.98</td>
</tr>
</tbody>
</table>

Figure 31: 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 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).
13 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](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. **Step 4** Enroll

   **Program Registration Landing Page**
   
   a. **When I select an Incentive Program, the message “This program is not available for enrollment” is displayed. Why can’t I enroll?**

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

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

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

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

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

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

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

      If your Location’s Status is “Pending External BSA” you need to complete section 1.7.2 of the Enrollment Guide.
## 14 Enrollment Scenarios

<table>
<thead>
<tr>
<th>Program Dates</th>
<th>Start Date</th>
<th>End Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration Period for Mail Owners (MOs)</td>
<td>02/15/2014</td>
<td>03/31/2014</td>
<td>Mail owners will need to complete enrollment in the earned value promotion by <strong>03/31/2014</strong>. Mail owners will be unable to participate in this incentive after this date.</td>
</tr>
<tr>
<td>Registration Period for Mail Service Providers (MSPs)</td>
<td>02/15/2014</td>
<td>03/31/2014</td>
<td>Mail service providers (MSPs) will be able to enroll in the earned value promotion starting <strong>02/15/2014</strong>. The last day to complete enrollment is <strong>03/31/2014</strong>. MSPs will be unable to participate in this incentive after this date.</td>
</tr>
<tr>
<td>Award Period (Tracking Period)</td>
<td></td>
<td></td>
<td>The program office will be tracking and calculating MO and MSP credits for their Business Reply and Customer Reply mail pieces during this period.</td>
</tr>
<tr>
<td>Mailer Agreement Period</td>
<td></td>
<td></td>
<td>MSPs and mail owners will have to finalize their permit selection as well as the credit that they have accrued by clicking on &lt;I Agree&gt; on the payment accounts and my activity report tabs.</td>
</tr>
<tr>
<td>Award Claim Period</td>
<td></td>
<td></td>
<td>Once the award claim period starts mail owners and MSPs will no longer be able to modify the permit they selected. It is only on or after the award claim period start date that mail owners and MSPs will be able to use all, or a portion of the credit they have accrued for the earned value promotion.</td>
</tr>
</tbody>
</table>
### Scenario 1: Mailer owner enrolls and selects their eligible permit to receive a discount.

<table>
<thead>
<tr>
<th>Enrollment Steps</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Contract Information</td>
<td>This tab allows mailer owners to enter and save their alternative contact information. Mail owners are required to enter their country, name, address, city, state, zip, phone number and e-mail address in order to complete this task.</td>
</tr>
<tr>
<td>Locations</td>
<td>The Locations tab allows mail owners to review their participating mailing locations. Mail owners must verify the accuracy of the displayed locations and select the &lt;I Agree&gt; button to complete this task.</td>
</tr>
<tr>
<td>Mailer IDs</td>
<td>The Mailer IDs tab will become available once the Locations tab has been completed. It allows mail owners to review their participating mailer IDs. Mail owners must verify the accuracy and completeness of the mailer IDs and select the &lt;I Agree&gt; button to complete this task.</td>
</tr>
<tr>
<td>Payment Accounts</td>
<td>The Payment Accounts tab allows mail owners to review their permits that are registered to their business locations. Mail owners will be able to change their permit selection until the end of the mailer agreement period. If mail owners would like their credit to be routed to their MSP permit refer to scenario 2.</td>
</tr>
<tr>
<td>Certification</td>
<td>The Certification tab becomes available once the preceding steps have been completed. Mail owners must agree to the Certification Agreement by selecting the &lt;I Agree&gt; button to complete this final enrollment step. Upon agreeing, mail owners are enrolled into the Incentive Program. Mail owners will know that they are fully enrolled when they see the Enrollment Status change to “Enrolled”.</td>
</tr>
<tr>
<td>Activity Report</td>
<td>The activity report provides mail owners with the ability to track their courtesy reply mail and business reply mail volumes as well as the credit accrued between the award period start and end date. Mail owners must click on &lt;I Agree&gt; by the end of the mailer agreement period so that they can receive the credit. The credit will be routed to the permit they selected in the payment accounts tab. No further action is required.</td>
</tr>
<tr>
<td>Permit Balance</td>
<td>This view enables mail owners to track the history of their credit usage by mailing date and mail class.</td>
</tr>
</tbody>
</table>
**Scenario 2:** Mailer owner enrolls in the earned value promotion and selects their MSP’s Permit to receive credit. This functionality will be available for new and existing users on 02/11/2013.

<table>
<thead>
<tr>
<th>Enrollment Steps</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Contract Information</td>
<td>This tab allows mailer owners to enter and save their alternative contact information. Mail owners are required to enter their country, name, address, city, state, zip, phone number and e-mail address in order to complete this task.</td>
</tr>
<tr>
<td>Locations</td>
<td>The Locations tab allows mail owners to review their participating mailing locations. Mail owners must verify the accuracy of the displayed locations and select the &lt;I Agree&gt; button to complete this task.</td>
</tr>
<tr>
<td>Mailer IDs</td>
<td>The Mailer IDs tab will become available once the Locations tab has been completed. It allows mail owners to review their participating mailer IDs. Mail owners must verify the accuracy and completeness of the mailer IDs and select the &lt;I Agree&gt; button to complete this task.</td>
</tr>
<tr>
<td>Payment Accounts</td>
<td>The Payment Accounts tab allows mail owners to review the permits that are associated to their registered business locations. Mail owners will be able to change their permit selection until the end of the mailer agreement period. Starting <strong>02/11/2013</strong>, mail owners will be given the option to search and save their MSP permit. This functionality will enable mail owners to route the credit they received for their mailings to the MSP permit. Please verify the accuracy and completeness of the permits and select the one that you want to use as your credit destination account. Once the mail owners have made their selection, they must click on the &lt;I Agree&gt; button to complete this task.</td>
</tr>
<tr>
<td>Certification</td>
<td>The Certification tab becomes available once the preceding steps have been completed. Mail owners must agree to the Certification Agreement by selecting the &lt;I Agree&gt; button to complete this final enrollment step. Upon agreeing, mail owners are enrolled into the Incentive Program. Mail owners will know that they are fully enrolled when they see the Enrollment Status change to “Enrolled”.</td>
</tr>
<tr>
<td>Activity Report</td>
<td>The activity report provides mail owners with the ability to track your courtesy reply mail and business reply mail volumes as well as the credit accrued between the award period start and end date. Mail owners must click on &lt;I Agree&gt; by the end of the mailer agreement period so that they can receive the credit. The credit will be routed to the permit they selected in the payment accounts tab. No further action is required.</td>
</tr>
<tr>
<td>Permit Balance</td>
<td>Mail owners, will be unable to view the permit balance report since they have selected a permit outside their profile.</td>
</tr>
</tbody>
</table>
**Scenario 3: Mail service provider enrolls in the earned value promotion and selects their own permit. Mail service provides will be able to enroll in the earned value incentive starting 02/11/2013.**

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

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