WORK AS A
CERTIFY THE **TEAM**

BCSP® | Guide to Group Management

FOR GROUP ACCOUNT MANAGERS (GAMs)

Together we create a safer workplace...

Thank you for creating a safety culture at your workplace!

The Board of Certified Safety Professionals (BCSP) is here to help you create the best safety culture through safety certification.

If you have an agreement with BCSP to manage your employees' certifications, the certification management system's (CMS) group management feature allows you to track their certification status, make payments on their behalf, and provides a payment history related to these activities.

If you would like to learn more about managing group certification, please contact Janey Morton at **+1 317-593-4800** or *groups@bcsp.org*.

To keep employees on track with their certification, this guide will give you a basic understanding of how to do the following:

- Check the Status of Employees
- Link or Unlink an Employee
- Pay Fees
- Requesting ADAAA Accommodations
- View Payment History and Access Receipts

Check the Status of Employees

Through the CMS, Group Account Managers (GAMs) can check the status of their employees' credentials. Time-sensitive requirements like eligibility expiration dates and recertification worksheet submissions are easily tracked. This CMS feature also gives GAMs the ability to arrange accolades for employees who have crossed

1. Log into *My Profile* with your username and password and select **Sponsor Group Management**.

Return to Menu	
Manage Profile & Preferences	Payment History / Receipts
Purchase Self-Assessment	Access Your Online Self-Assessment(s)
Applications	Eligibility and Exam Status
Purchase Exam	Certification History
My Badge(s)	Pay Annual Renewal(s)
Purchase Wall Certificate	Wallet Card
Link to Sponsor	★ Earn Recertification Points (Quizzes & KSA)
Recertification	Sponsor Group Management

2. Select **Manage My Group**.

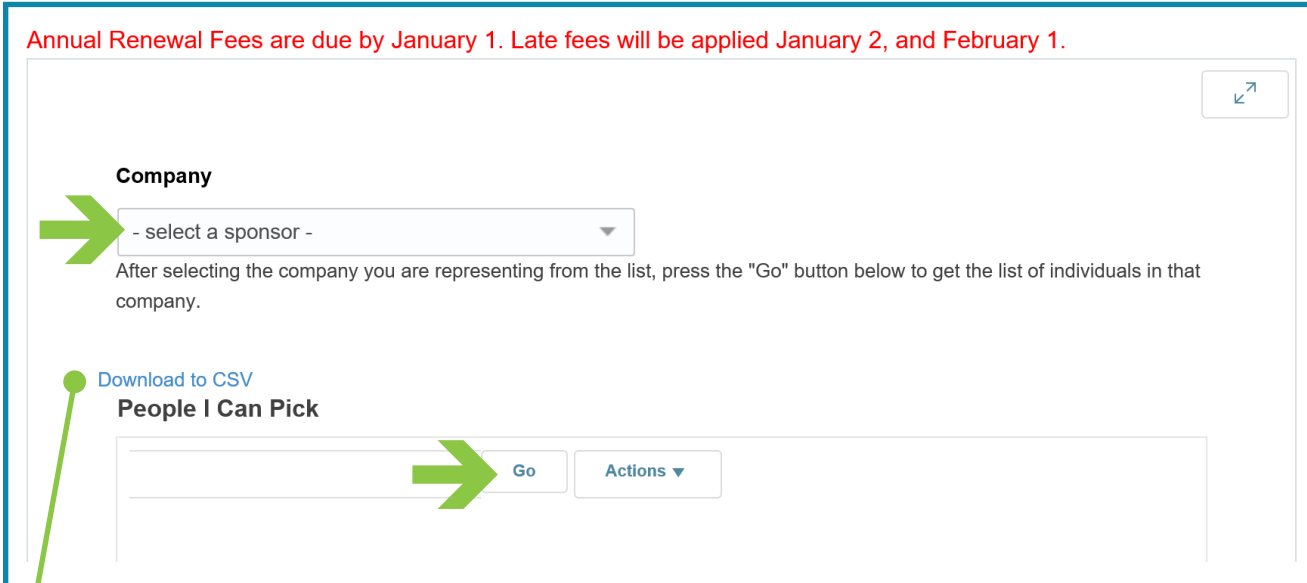|	
Return to Menu	
Manage My Group	Sponsor Certification Shopping Cart
Group Payment History/Receipt	

3. From the **Company** pull-down menu, select the name of your group. Select the **Go** button. This will provide a list of all the employees linked to your group through their *My Profile* account.

You will be able to check their:

- Customer ID
- Last name, middle name, first name, suffix
- City, state
- Level
- STS or STSC award date
- End date
- Email address

The level will be either exam eligible, exam authorized, or certified; the end date is their eligibility, authorization, or recertification cycle end date. The award date is the date they achieved certification.

Annual Renewal Fees are due by January 1. Late fees will be applied January 2, and February 1.

Company

- select a sponsor -

After selecting the company you are representing from the list, press the "Go" button below to get the list of individuals in that company.

Download to CSV

People I Can Pick

Go   Actions ▼

Note: Clicking the **Download to CSV** button will generate a list of names in your group into an excel spreadsheet.

Link or Unlink an Employee

A GAM may occasionally need to update their employees' accounts. New employees may need to be added; previous employees may need to be removed. This system makes it easy to update your group of certified employees.

1. Log into *My Profile* with your username and password and select **Sponsor Group Management**.

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Download to CSV
People I Can Pick

Go   Actions ▼

4. Select the **(-) icon** to unlink the individual from your group, and select **OK** on the box that opens to confirm your desired action. This will remove the individual from your group, and you will no longer have access to their information.

Download to CSV
People I Can Pick

Go   Actions ▼

1 - 1 of 1

Customer ID	Last Name	Middle Nm	First Name	Suffix Nm	City	State	Level	STS Award Dt	STSC Award Dt	End Date	Email
1001800253	User4		Test		Indianapolis	IN	STS				

Message from webpage ✕

? Are you sure you wish to unlink this member from this organization?

OK   Cancel

Note: If you want to link someone to your group account, contact **Janey Morton**, Sr. Specialist, Group Management, at **+1 317-593-4800** or ***groups@bcsp.org***.

Pay Fees

A GAM has the convenient ability to pay application fees, exam fees, eligibility extensions, recertification extensions, and annual renewal fees directly through their profile.

1. Log into *My Profile* with your username and password and select **Sponsor Group Management**.

<div style="border:1px solid #137ca0;">

Return to Menu

Manage Profile & Preferences	Payment History / Receipts
Purchase Self-Assessment	Access Your Online Self-Assessment(s)
Applications	Eligibility and Exam Status
Purchase Exam	Certification History
My Badge(s)	Pay Annual Renewal(s)
Purchase Wall Certificate	Wallet Card
Link to Sponsor	⋆ Earn Recertification Points (Quizzes & KSA)
Recertification	➡ Sponsor Group Management

</div>

2. Select **Sponsor Certification Shopping Cart**.

<div style="border:1px solid #137ca0;">

Return to Menu

Manage My Group	➡ Sponsor Certification Shopping Cart
Group Payment History/Receipt	

</div>

3. From the **Company** pull-down menu:
      (A) Select the name of your group.
      (B) Select the radio button next to the fee you want to pay.

Annual Renewal Fees are due by January 1. Late fees will be applied January 2, and February 1.

Company

A - select a sponsor -

○ Application ○ Exam ○ Eligibility Extension ◉ Recertification Extension ○ Annual Renewal **B**

After selecting the company you are representing from the list, press the "Go" button below to get the list of individuals in that company.

(C) Select the **Go** button.

This will show a list of all the employees linked to your group who have this fee due. Detailed information includes the amount owed along with their eligibility end date.

(D) Select the **(+)** icon to add employee(s) to the shopping cart for payment **(Notice the + icon will change to a ✓ when selected)** or

(E) Choose **Select All*** to move everyone at once.
This will show the amount due and total due of what has been added to the shopping cart.

*Note: When selecting all, BCSP recommends checking the list of employees prior to moving everyone to the shopping cart to pay.

People I Can Pick

C Go   Actions ▼   **E** Select All

1 - 4 of 4

Select	Customer ID	Last Name	Middle Nm	First Name	Suffix Nm	City	State
D ✔	00000000	Smith	S	John		Brazil	IN
➕	00000001	Pan	E	Peter		Brazil	IN
➕	00000002	Mouse	M	Micky		Brazil	IN

Tagged for Payment

Remove All

	Name	Certification	Pr
➖	John S Smith	STS CONSTRUCTION RECERTIFICATION EXTENSION FEE	$1

row(s) 1 - 1 of 1

Total Amount Due : $100.00

Pay

4. When you move individuals to the shopping cart you see the individual's purchase item and fee in the shopping cart. To remove the person from the shopping cart, select the **(-)** icon. When you click on the **Pay** button, the next screen will show an itemized amount per individual.

5. The fees shown in the shopping cart (see below) were generated by selecting the radio button for **Exam**.

You can pay via credit card or electronic check. You can only pay for one category at a time. Combining the application, exam, and annual renewal fee into one transaction is not an option.

6. From **Payment Options**, select **Credit Card** or **ACH Real Time**.
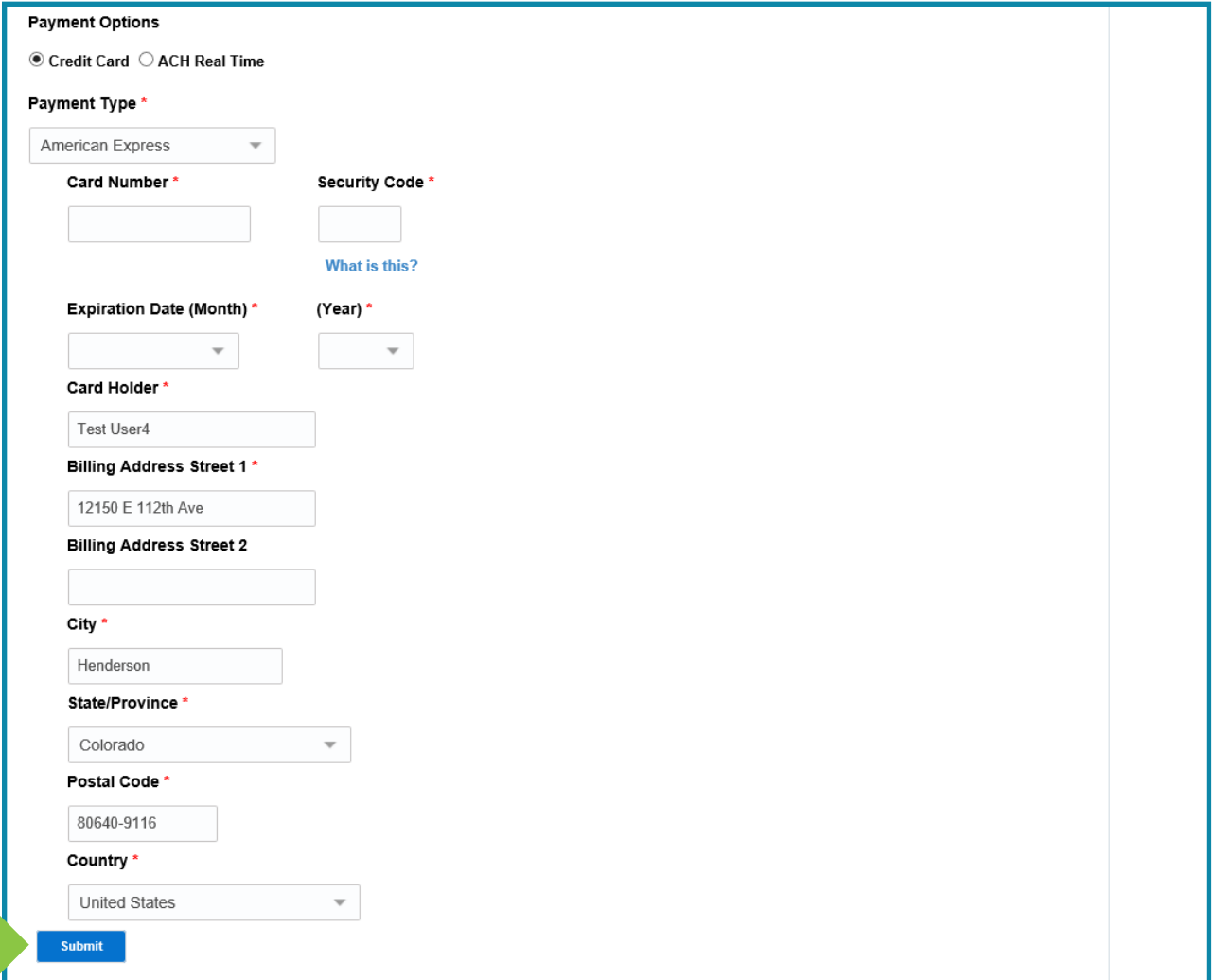
> **Payment Options**
>
> ○ **Credit Card** ○ **ACH Real Time**

7. If you select credit card, you will then see a **Payment Type** pull-down. Select American Express, Discover, or Visa/Mastercard and **Submit**.

> **Payment Options**
>
> ◉ **Credit Card** ○ **ACH Real Time**
>
> **Payment Type** *
>
> - select a payment type - ▼
>
> **Submit**

8. Complete the required information and **Submit**.

> **Payment Options**
>
> ◉ **Credit Card** ○ **ACH Real Time**
>
> **Payment Type** *
>
> American Express ▼
>
> **Card Number** *   **Security Code** *
>
> [   ]   [   ]
>
>   **What is this?**
>
> **Expiration Date (Month)** *   **(Year)** *
>
> [▼]   [▼]
>
> **Card Holder** *
>
> Test User4
>
> **Billing Address Street 1** *
>
> 12150 E 112th Ave
>
> **Billing Address Street 2**
>
> [   ]
>
> **City** *
>
> Henderson
>
> **State/Province** *
>
> Colorado ▼
>
> **Postal Code** *
>
> 80640-9116
>
> **Country** *
>
> United States ▼
>
> **Submit**

Note: When the payment has been submitted, your final payment screen will show the payment was successfully processed. For a printed copy of this transaction, click **Print receipt**.

print receipt

Contact Information

ID: 1196984
Company Name
12150 E 112th Ave
Henderson, CO 80640-9116

Receipt Information

Receipt # 874926

Receipt Date 08/08/2019

Receipt Items

Description	Unit Cost	Quantity	Price
STSC EXAM (1 EXAM) for John S. Smith	**$185.00**	1	**$185.00**
Ship To: John S Smith			

Subtotal		**$185.00**
Shipping		$0.00
Sales Tax		$0.00
Balance Due		$0.00

Payment Information

Paid By	Amount Paid	Payment Method
Test User4	**$185.00**	Visa/Mastercard XXXXXXXXXXXX1111

Requesting ADAAA Accommodations

Americans with Disabilities Act (ADA)

Applicants needing special accommodations to take their exam must submit a special accommodation request with BCSP at the time the exam is purchased. Accommodation requests should be emailed to *accomodations@bcsp.org* and should include the type of accommodation the applicant is seeking for the exam they are planning to take at Pearson VUE. Failure to request at the time of exam purchase may impact the ability to have the accommodations provided at the testing center.

BCSP and Pearson VUE work together to provide accommodations for documented disabilities as outlined by the ADA. Pearson VUE has a listing of items that are considered comfort aids and do not require preapproval. This list is available at home.pearsonvue.com/test-taker/Test-accommodations/Comfort-aids.aspx.

Please note that BCSP will not disclose information about a candidate's disabilities to a third party, such as a group account manager.

View Payment History and Access Receipts

The ability to access your payment history is helpful when preparing for next year's budget or when needing documentation for expense reports.

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2. Select **Group Payment History/Receipt**.

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3. In the **Reports** drop-down menu, select which time period you would like displayed. A list of transactions will display and a receipt may be opened by selecting on a transaction's **Receipt** link.

Welcome, Test User4
Customer #: 1001800253

Return to Menu

Default
1. Primary Report
2. Payments in the Last 30 Days
3. Payments in the Last Year

Go   Actions ▼

1 - 1 of 1

Receipt	Paid By Name	Payment Date	Payment Type	Payment Reference	Paid For
Receipt	Company Name	08/08/2019	Visa/MC	XXXXXXXXXXXX1111	Invoices

1 - 1 of 1

Note: To print a receipt, select **print receipt** and then use the print option from your browser. If you encounter any difficulty in printing a receipt, contact Janey Morton at **+1 317-593-4800** or *groups@bcsp.org*.

print receipt

Test User4
8645 Guion Rd
Indianapolis, IN 46268-3045

Payment Date :   08/08/2019

Paid By :   Company Name

Payment Amount : $100.00

Payment Method :   Visa/Mastercard XXXXXXXXXXXX1111