WORK AS A CERTIFY THE TEAM

BCSP Guide to Group Management
FOR GROUP ACCOUNT MANAGERS (GAM)

Together we create a safer workplace...
Thank you for creating a safety culture at your workplace!

BCSP is here to help you create the best safety culture through safety certification.

If you have an agreement with the Board of Certified Safety Professionals (BCSP) to manage your employees’ certifications as a group, the certification management system’s (CMS) group management feature gives you the tools 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
- View Payment History and Access Receipts
Check the Status of Employees

The ability to check the status of your employees’ credentials keeps Group Account Managers (GAMs) time-sensitive requirements like eligibility expiration dates or recertification worksheet submission timetables. This CMS feature also gives GAMs the ability to arrange accolades for employees who have crossed significant milestones, such as holding certification for 5, 10, or 15+ years.

1. Login to My Profile with your username and password and select Sponsor Group Management.

2. Select Manage My Group.
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.

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**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. Login to **My Profile** with your username and password and select **Sponsor Group Management**.

2. Select **Manage My Group**.
3. From the **Company** pull-down menu, select the name of your group. Select the **Go** button.

   ![Company pull-down menu example]

   **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]

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 example]

   ![Message from webpage]

   **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. Login to My Profile with your username and password and select Sponsor Group Management.

2. Select Sponsor Certification Shopping Cart.
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.

   ![Company Pull-Down Menu](image)

   **(C)** Select the **Go** button.
   
   *This will show a list of all the employees linked to your group who have this fee to pay. 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.*

   ![Employee List](image)

   **Note:** When selecting all, BCSP recommends checking the list of employees prior to moving everyone to the shopping cart to 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 in one transaction is not an option.
6. From Payment Options, select Credit Card or 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.

8. Complete the required information and 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.
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.

1. Login to My Profile with your username and password and select Sponsor Group Management.

   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 Group Payment History/Receipt.
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.

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.