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' or members' credentials, the Management Information System (MIS) and the Certification Management System (CMS) allow you to track their applications and credential status, make payment on their behalf, print wallet cards, and access a payment history related to these activities (provided the employee or member has granted permission for you to view their information).

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

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

Register to Become a Group

You may log in to your profile by visiting **GROUPS.BCSP.ORG** and entering your *My Profile* username and password.

If this is the first time visiting the site and you do not have a *My Profile* username and password, click the **Register** button at the top of the page to complete and submit a new group registration form. You will be notified when the registration form is approved. If this is your first time registering and you do not have a *My Profile* account, your *My Profile* login information will be sent to you in a separate email.

A group will be created with you as the Group Account Manager (GAM). The first time you log in, you will be asked to finalize your account.

If you are requesting to be added as a GAM to an existing group record and you have a 10-digit customer number, click the **Register** button and answer the required questions. You will be notified when the registration form is approved and you have been added as a GAM.

Or you may go to the BCSP website, **BCSP.ORG**, click the *My Profile* button, and select the **Group Management** option.

Manage Profile & Preferences	Payment History / Receipts
examCORE	Purchase Self-Assessment
Applications	Group Management

When you log in for the first time, whether it is from MIS or *My Profile*, you will be asked to finalize your account.
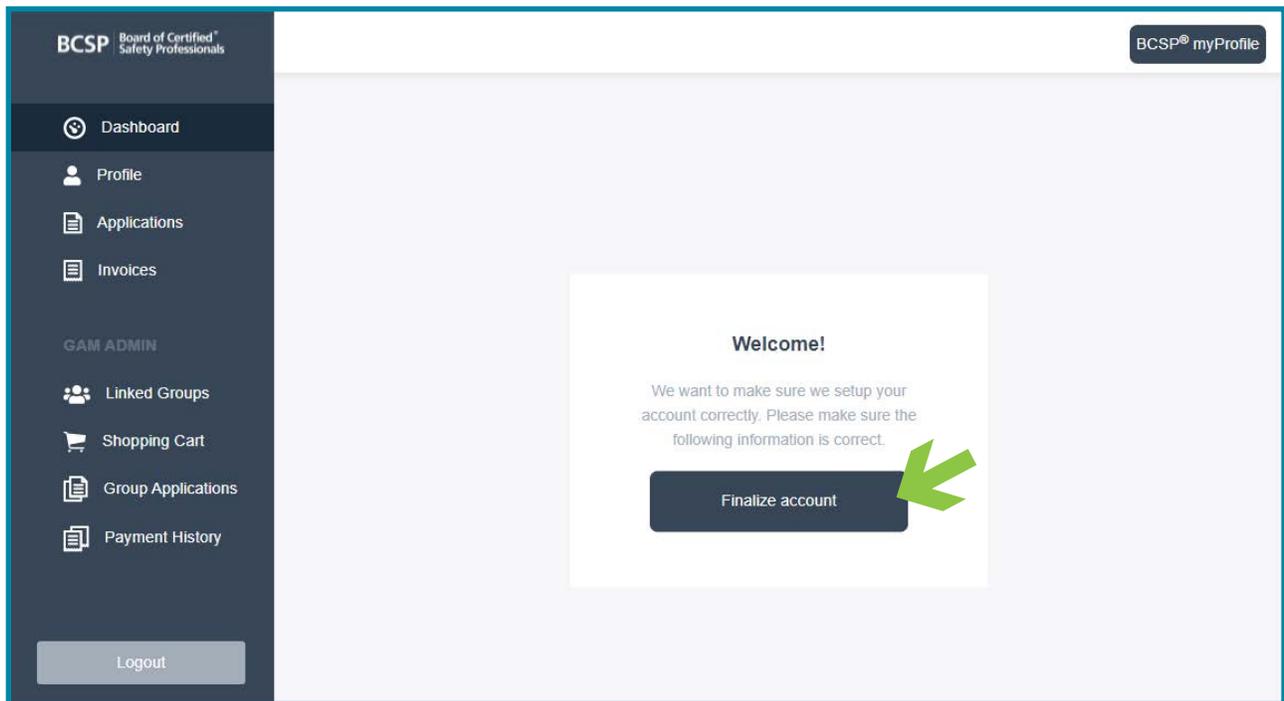
To finalize your account, you will need to go through the same process as a new credential applicant by granting permissions (if you so choose), agreeing to the Terms of Agreement (required), and then clicking **Next**. Allowing GAM(s) access to your information will make it visible to other GAMs from your organization.
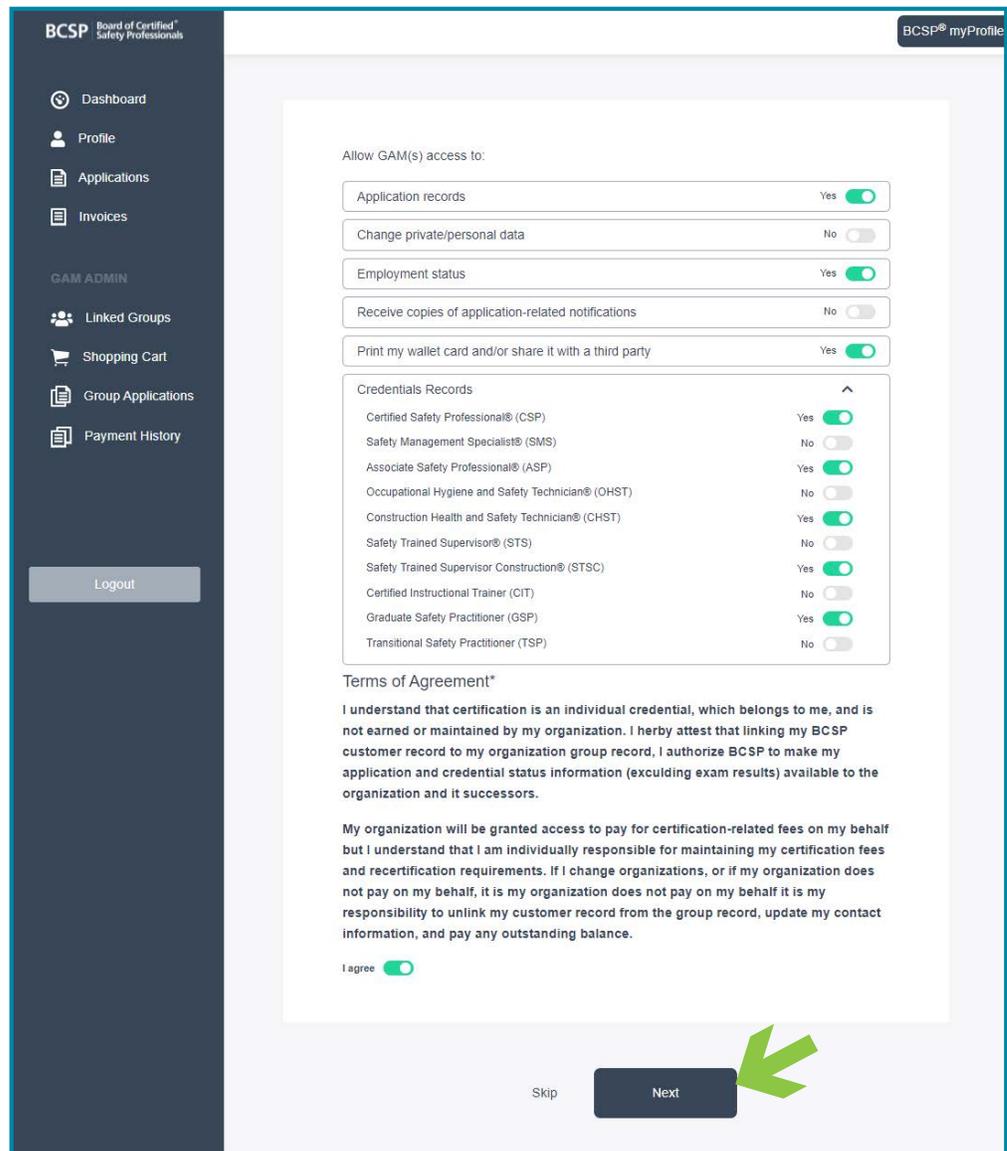
After clicking the next button, you will receive verification that your account has been set up. Click **Begin** to proceed.
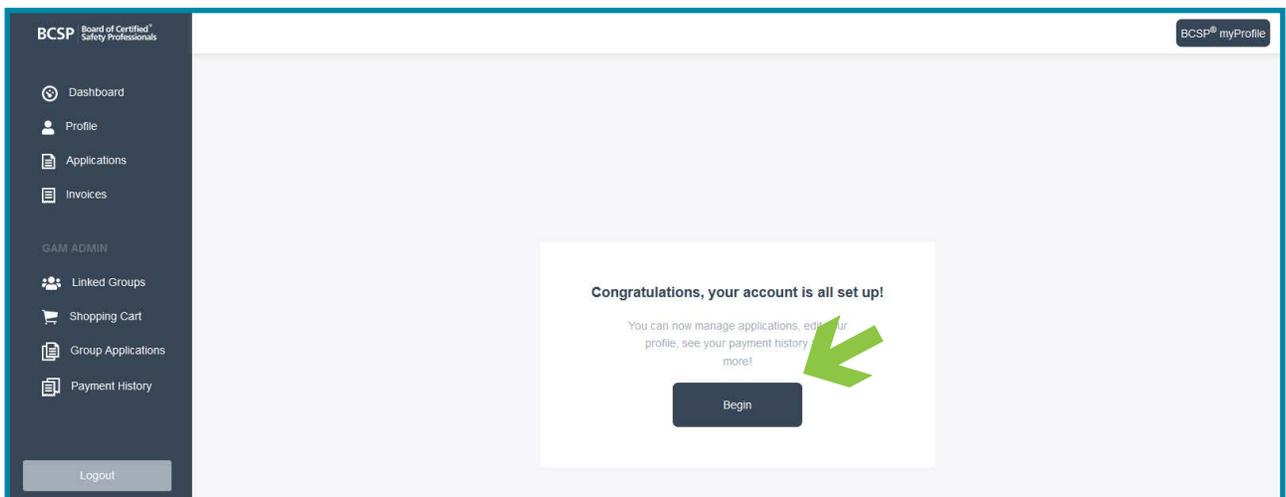
Use the GAM Dashboard

Screenshots used for this document are for illustration only. What you see will vary depending on your personal information or the group for which you are the group account manager.

The dashboard is designed with your personal information as well as the group information. The screenshot below with the **Me** tab highlighted shows your personal information.

The GAM Dashboard shown below shows an individual GAM's personal information.

The notifications section will show when renewal, recertification, or other deadlines are approaching, or when the invalidation deadline is approaching.
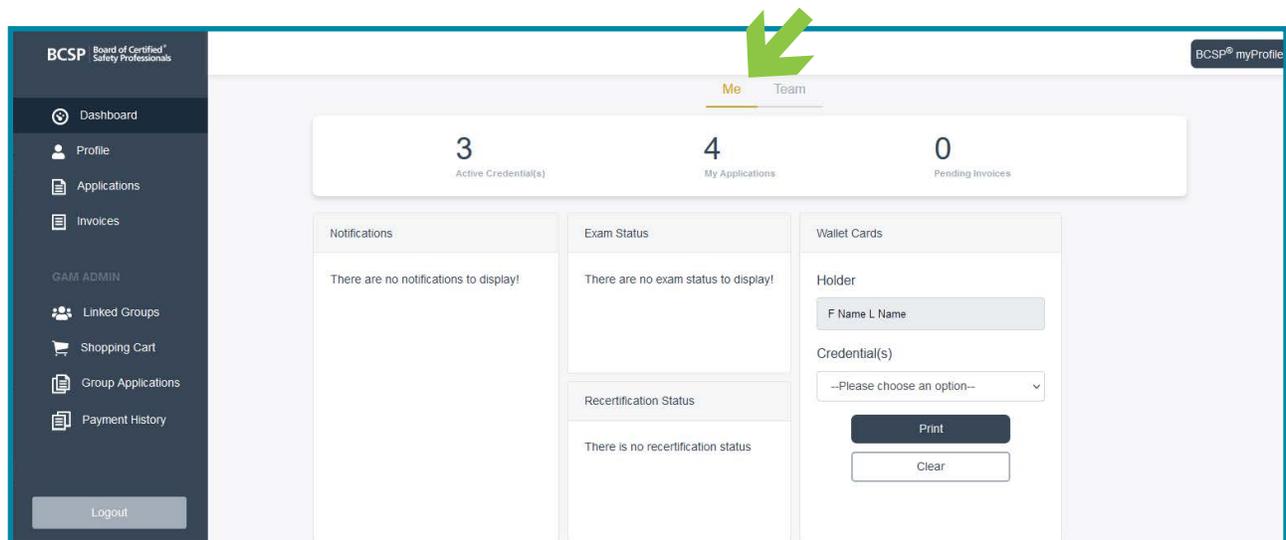
The **Profile** option shows personal information including the GAM name, customer ID, group(s) linked to, location, email, and credentials held.
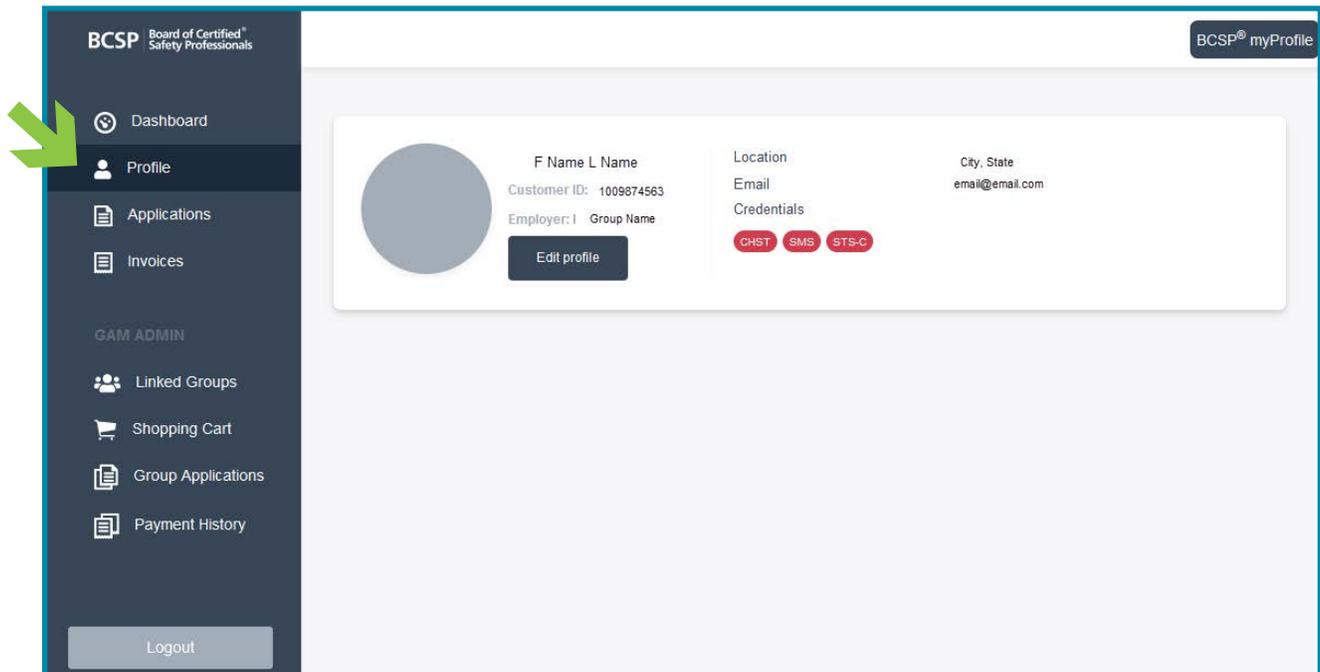
When clicking the **Applications** option, the default tab is **Active**. The screenshot below shows the GAM with zero (0) active applications.
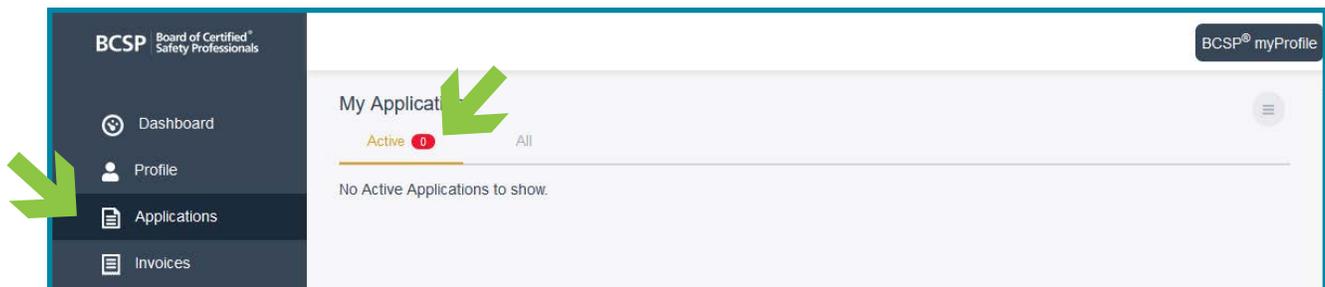
When the **All** tab is selected, the GAM's applications and status of each is shown. The number of applications matches the number shown on the dashboard.
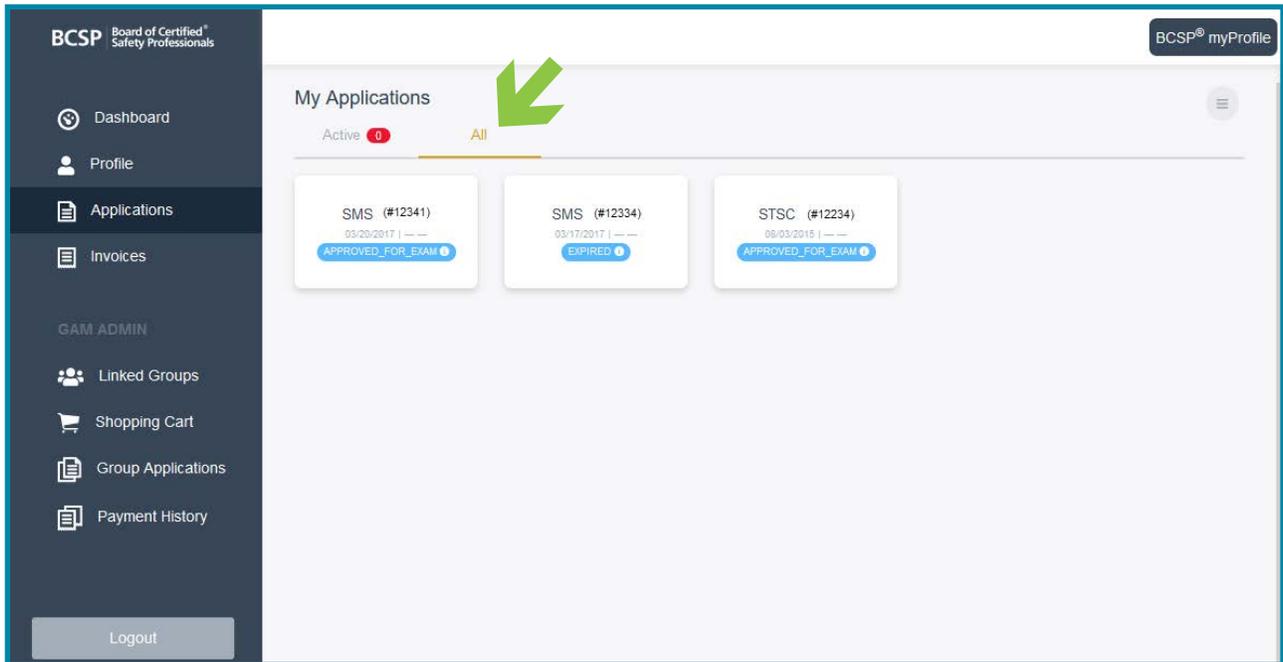
The **Invoices** option shows the GAM's personal information/receipts. If you click **Receipt**, a PDF is created for you to save or print.

When the **Team** tab is selected, the group information is located under each heading. The numbers shown under the **Team** tab include the number of groups you are responsible for, total number of employees/members, and active credentials held. This information is dependent on the permissions granted by your employees/members.

You can print an individual wallet card or multiple wallet cards per credential depending on permissions granted. To print wallet cards, click the pull-down under **Credential(s)** to select which credential, and the pull-down under Holder(s) to select the employee(s)/member(s). If a wallet card does not display for one of the members, it is because the person does not hold the chosen credential or has not granted permission for the GAM to see it.
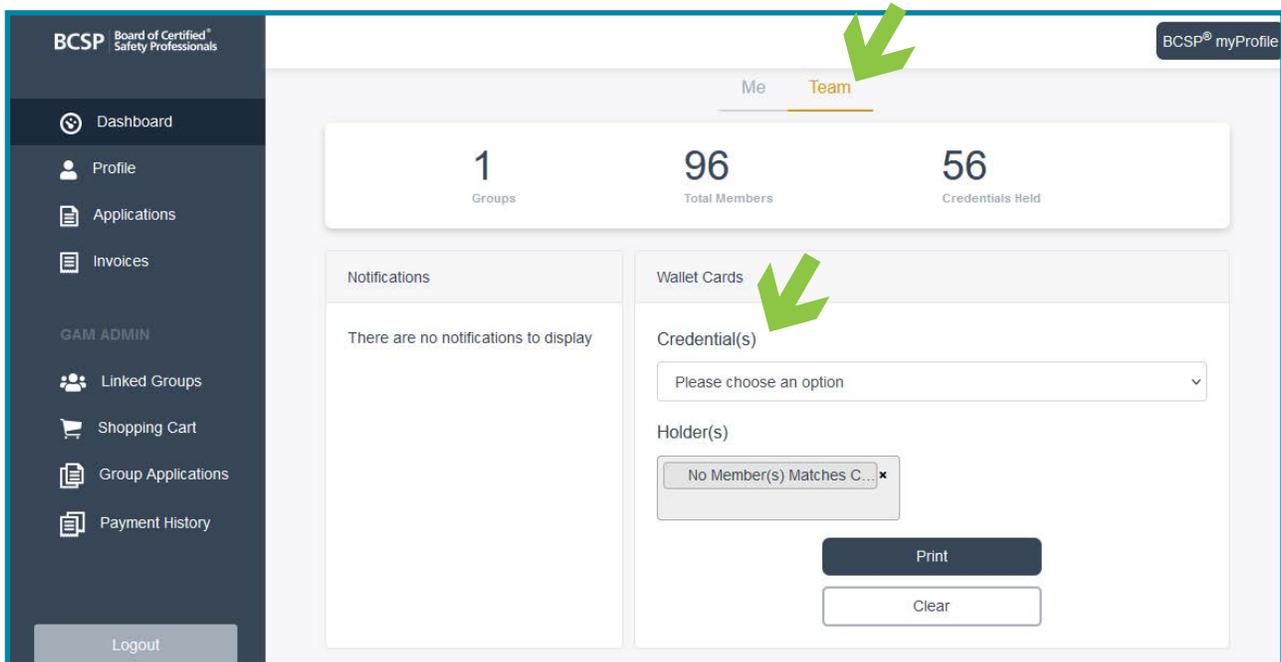
The **Linked Groups** option shows the group name and the sponsorship status level that appears on the BCSP website.
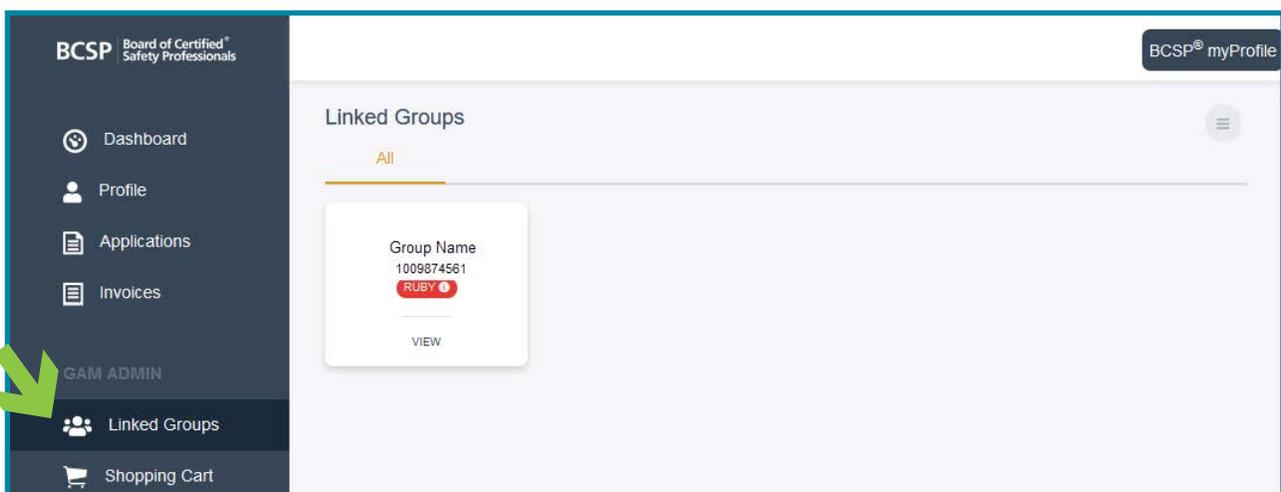
Update Organization Information

The GAM can request an organization name change by:

1. Click on **Linked Groups** on the left,
2. then **View**.
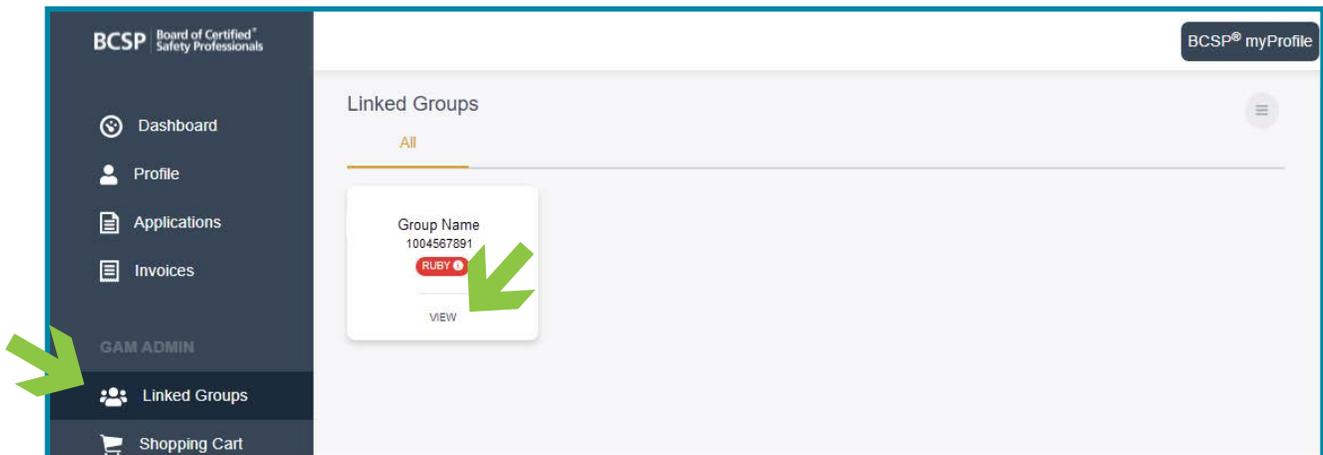
3. Click on **Edit Profile** next to the picture
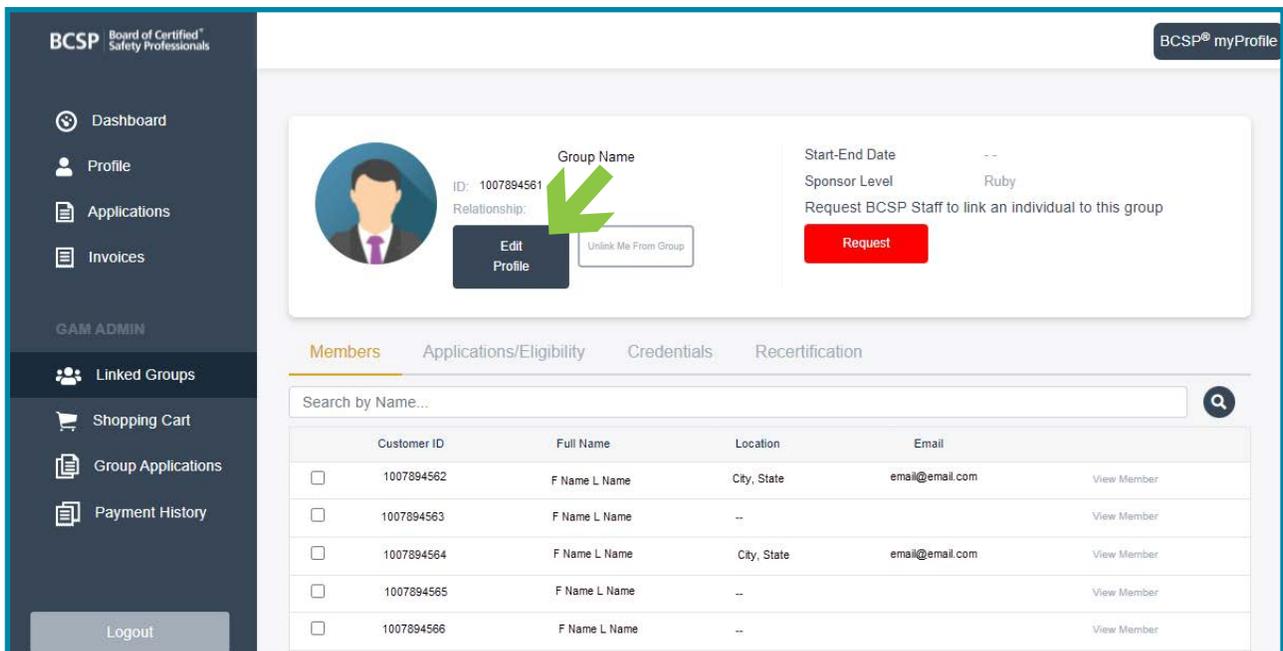
4. Click on the **Request Name Change** button on the right.

5. Type the new name of the organization and the URL of your organization's website and then click **Request**.

Your name change request will be sent to BCSP and you will be notified when the change has been made. Any other updates can be made at anytime by you.

Link or Unlink an Individual to or from a Group

Link an Individual to a Group

You may request BCSP staff to link an individual to this group by clicking the **Request** button. As shown in the second screenshot below, you will be asked to enter the name and email of the individual and a request will be sent to BCSP. BCSP will contact the individual with instructions on how to update permissions granting the GAM access.

Unlink Individuals from a Group

A GAM may occasionally need to update their employees'/members' accounts. New employees/members may need to be added, and previous employees/members may need to be removed. This system makes it easy to update your group of credentialed employees/members.

1. Click **View** under the sponsorship status level.
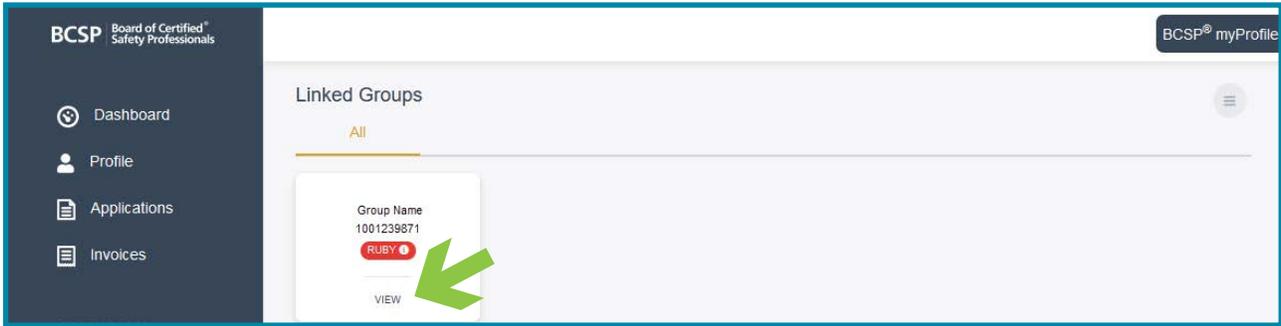
2. Check the box on the left next to the customer ID column of the person(s) you are wanting to unlink and then click the **Unlink Selected Member(s)** button on the right.
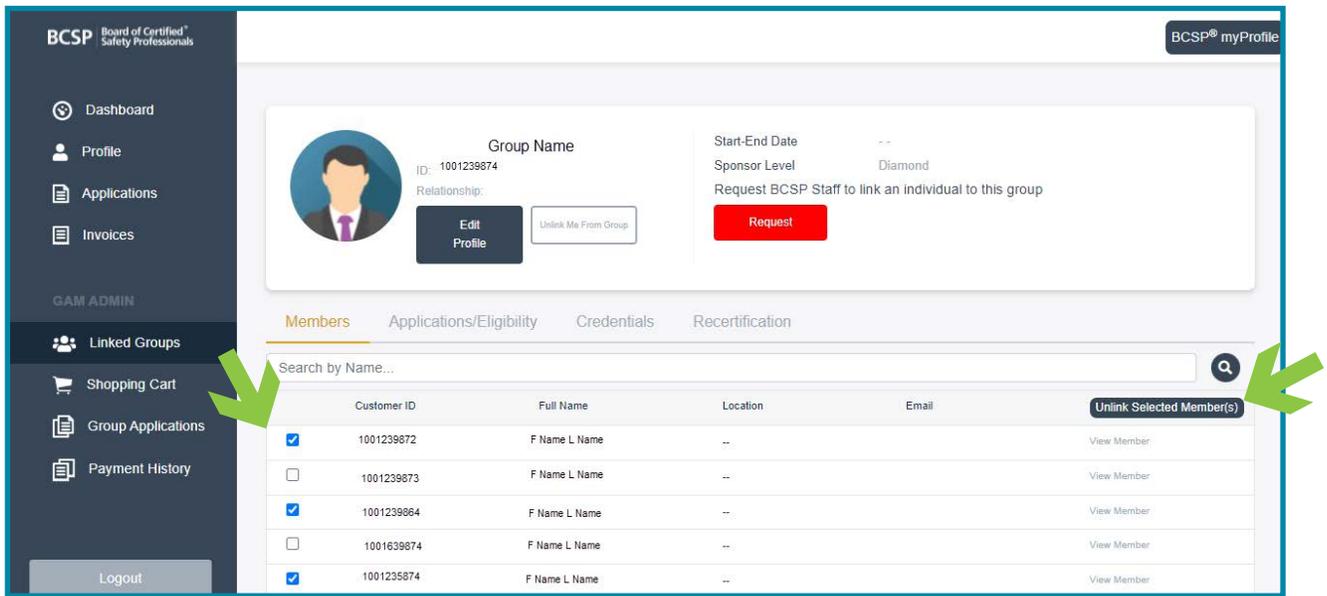
You will receive a pop-up to verify that you want to unlink those checked.
Click **Yes** to unlink.
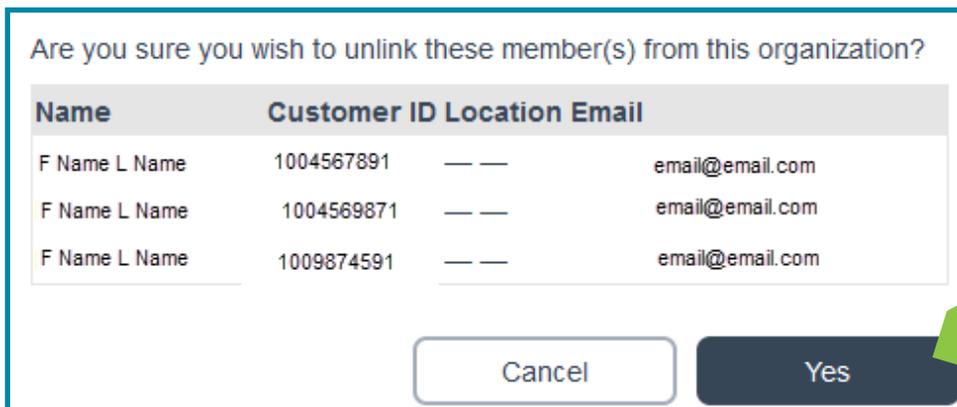
Unlink a GAM from a Group

GAMs can also unlink themselves from a group.

1. Click **View** under the sponsorship status level.
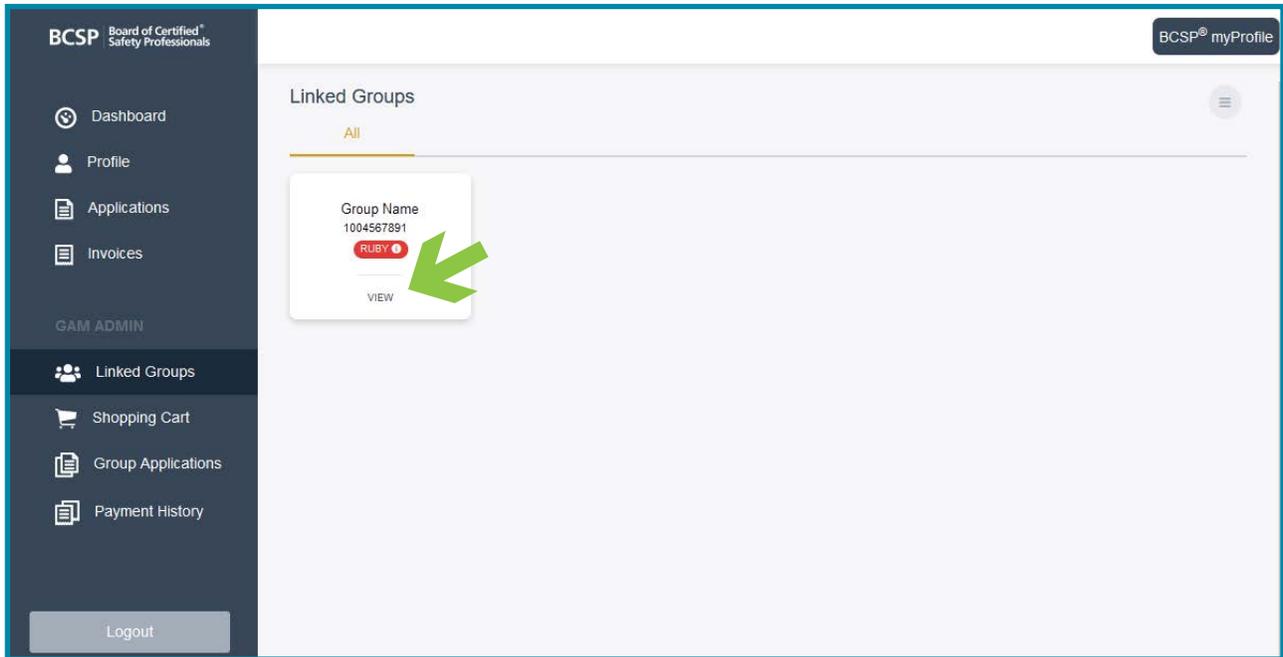
2. Click the **Unlink Me From Group** button next to the **Edit profile** button.
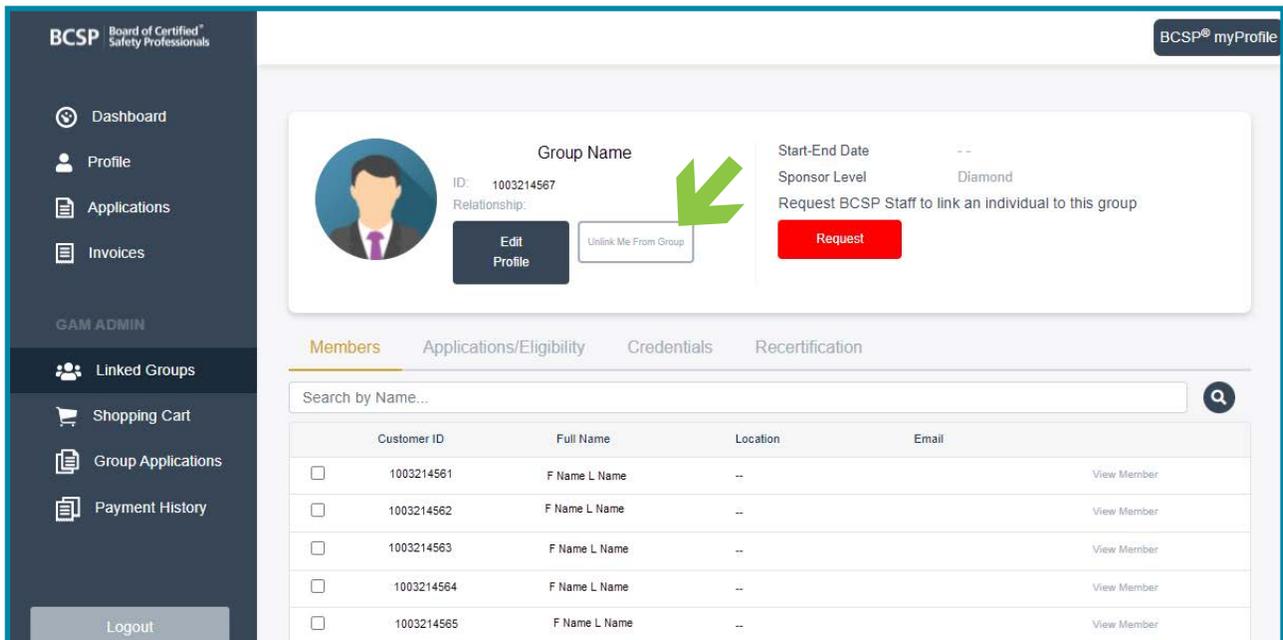
Check Employee/Member Status

1. Click **View** under the sponsorship status level.
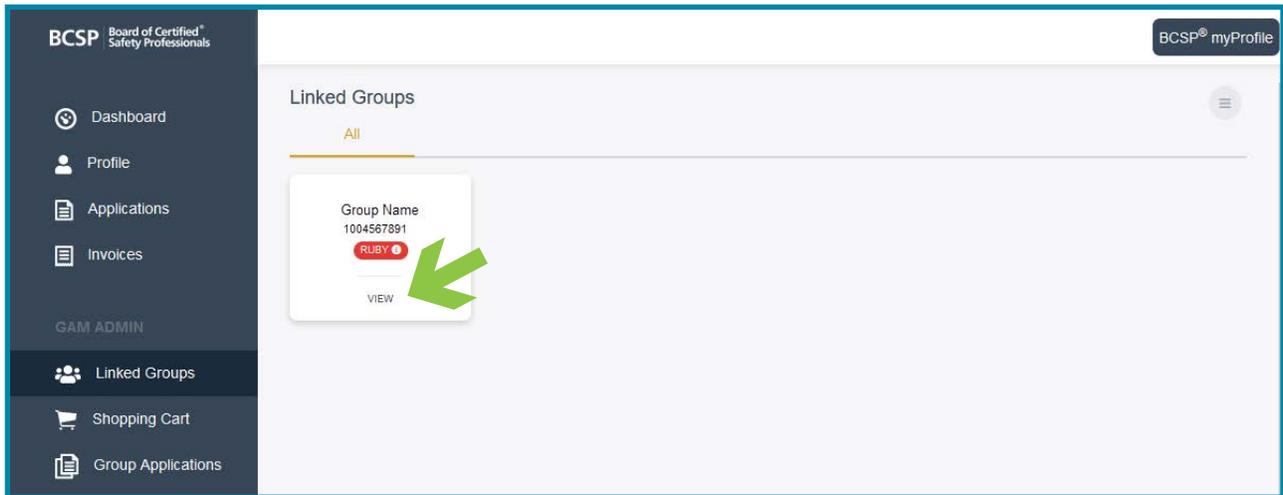
2. To check the status level of employee(s)/member(s), click one of the tabs, **Application/Eligibility, Credentials,** or **Recertification**, and filter by credential and status level, or you can search by name.
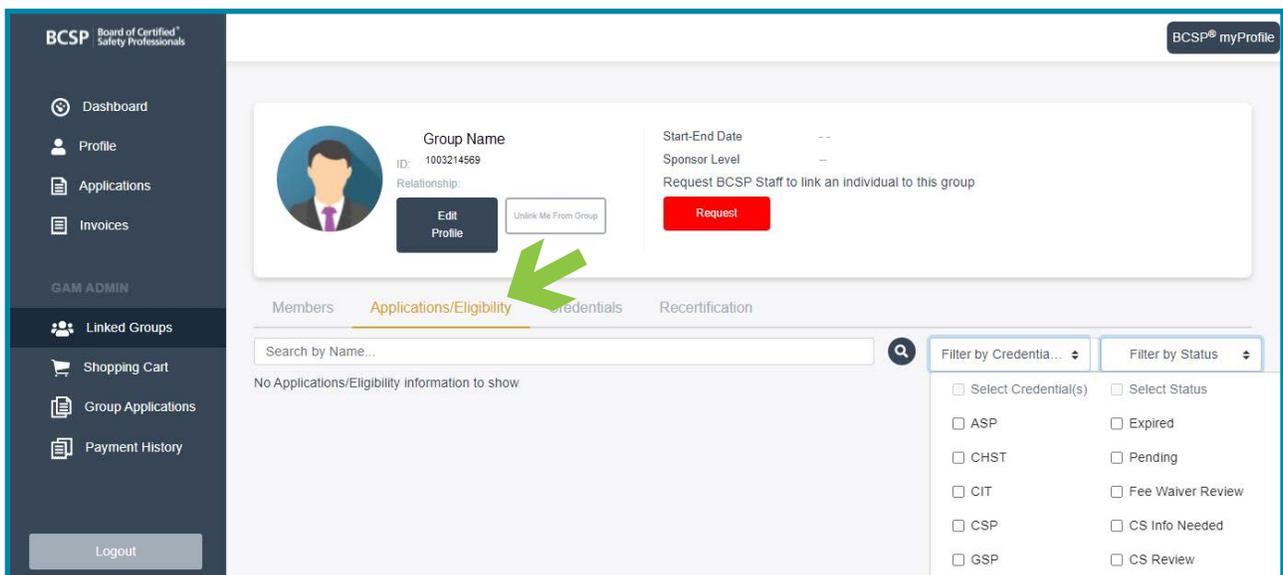
Request Permissions from an Employee/Member

1. Click **View** under the sponsorship status level.
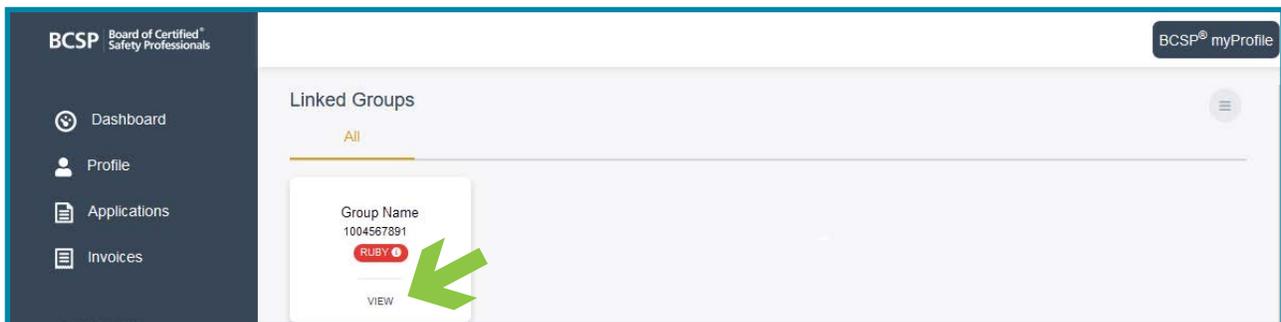
2. Click **View Member**.

3. Click **Request**.
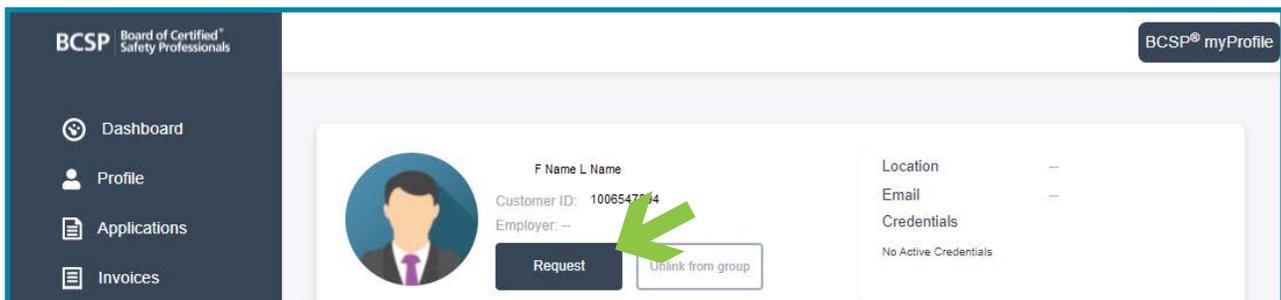
4. Click **Yes** to verify that you want to request permissions and an email will be sent to the employee/member requesting them to grant permissions for their additional information or credential(s).
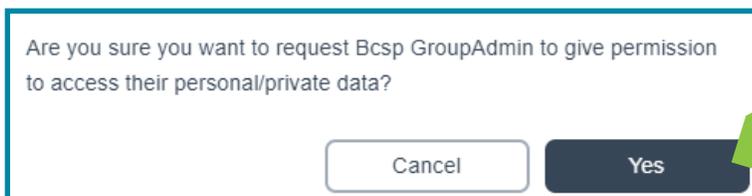
The applicant/credential holder can grant permission for the GAM(s) for their group to be able to view private/personal data, view employment status, receive copies of application-related notifications, print their wallet card and/or share it with a third party.

If the applicant/credential holder grants permission to view private/personal data, in addition to the Customer ID, Full Name, under the **Members** tab, the GAM will see under Location, the city and state, and under Email, the primary email address on their record.
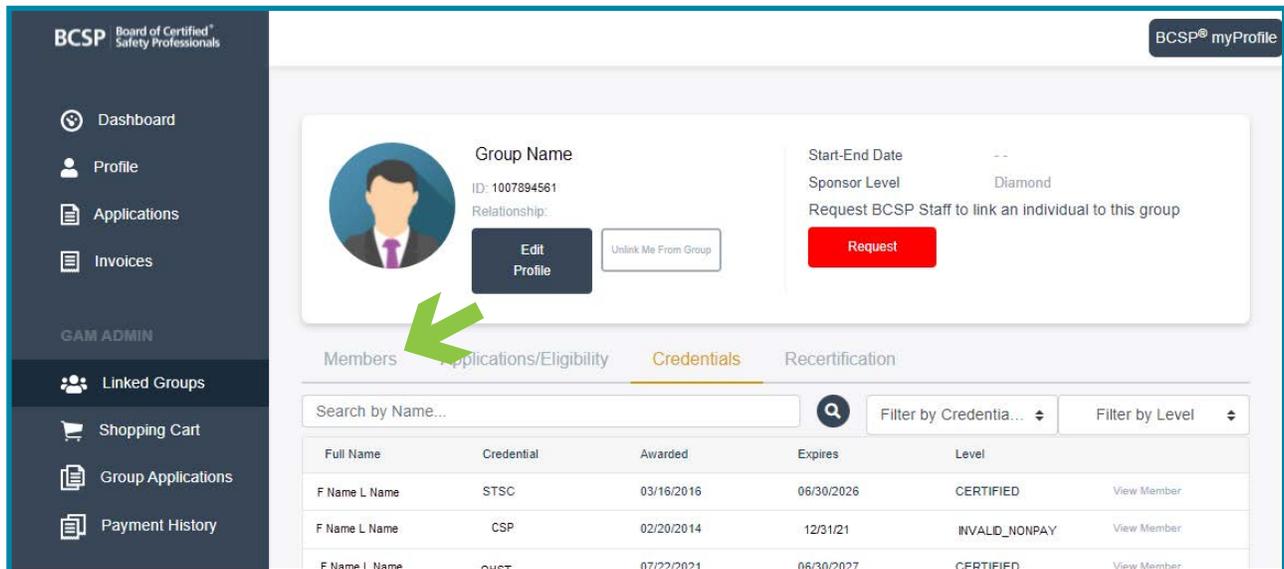
If the applicant/credential holder grants permission to Application Records, under the **Applications/Eligibility** tab, the GAM will be able to see the credential(s), date created on, date submitted on, submittal # and status of the application. Filters available are by credential(s), status of Expired, Expired Eligibility, Pending, Fee Waiver Review, CS Info Needed, CS Review, Exam Eligible, Exam Authorized, and Eligibility Extension.
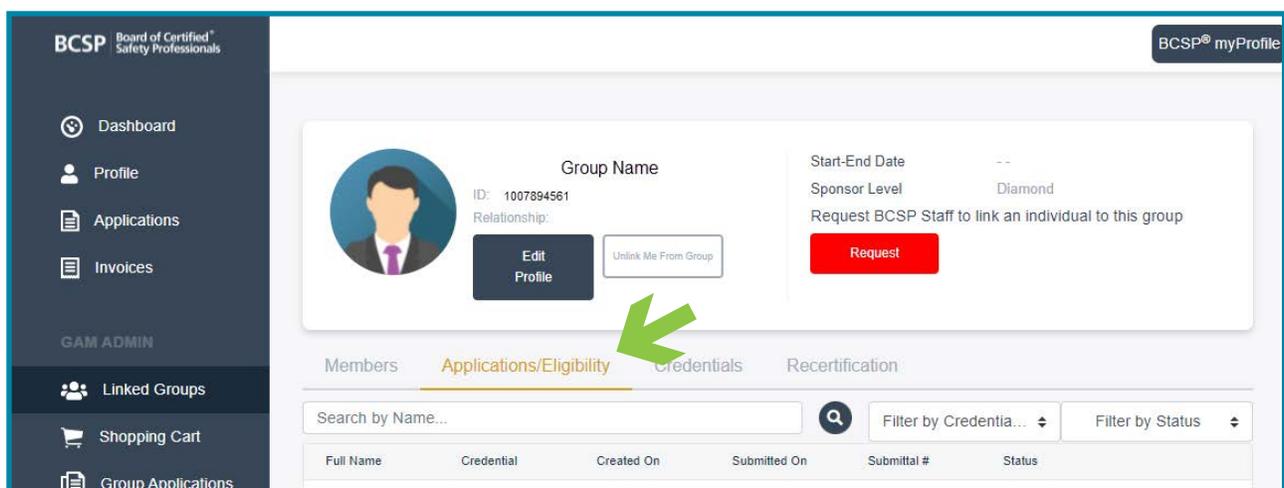
If the applicant/credential holder actively holds or has held the credential, the information the GAM will be able to see under the **Credentials** tab are the credential(s) held, depending on permissions granted, the date the credential was awarded, the certification expiration date which is the five-year recertification cycle end date, the designation expiration date which is a six year end date, and under the Level column, the GAM will see whether certified, designation awarded, invalidated – non pay, invalidated – recertification, invalid – voluntary, expired, expired – no reapply, and retired. Filters available are by credential(s) and by level and can be used on the Applications/Eligibility, and Credentials tabs.

Under the **Recertification** tab, the GAM can view full name, credential(s) held, whether the worksheet has been submitted, due date, date submitted, CS Review, and Approval Date. Filters available are by credential(s), submittal status, and by CS review status.

Pay Fees and Make Purchases

A GAM has the convenient ability to pay application fees, single exam fees, exam bundle fees, annual renewal fees, non-pay reinstatement fees, recertification reinstatement fees, eligibility extensions, recertification extensions, and wall certificate fees.

1. Click on the **Shopping Cart** option and you will be routed to the CMS, which is the system BCSP uses for payments.

Multiple products can be purchased in one transaction. Shown below are two annual renewal fees and an application fee that have been added to the shopping cart. Select the **(+)** icon to add employee(s)/member(s) to the shopping cart for payment and the **(-)** icon to remove employee(s)/member(s) from the shopping cart. When selecting the **Pay** button, the next screen will show an itemized amount per individual.

1. From the **Company** pull-down menu, select the name of your group. The group must be selected for a product to appear in the product pull-down.

2. The screenshot below shows the Exam: Bundle Exam product selected with two applicants eligible to have an exam bundle purchased. From the **Product** pull-down menu, select the product you wish to purchase. When the product is selected, a list of employees/members will appear in the left box showing the name of the employee/member, customer number, city, state, credential, end date, and level.

3. Click **Pay** to make the payment.

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

Company

Group Name ▾

Product

Exam: Bundle Exam ▾

Employee List
Select or Search for employees to add to group payment list.

[   ]   Search

Add All Bundles

⊕ F Name L Name   OHST
   1003214567   End Date: 11/12/2022
   City, State   EXAM_ELIGIBLE

⊕ F Name L Name   CIT
   1003214565   End Date: 07/03/2022
   City, State   EXAM_ELIGIBLE

1 - 2

Group Payment List
Employees selected for payment.

Remove All

⊖ F Name L Name   STS-C $90.00
   Group Name   Annual Renewal

⊖ F Name L Name   CHST $195.00
   Group Name   Annual Renewal

1 - 2 of 2

Total Amount Due : $285.00

Pay

Additional Guidelines for Specific Products

Note: Eligibility extensions are available to purchase within 60 or fewer days of their eligibility deadline.

An exam bundle includes two (2) exam attempts and one (1) free self-assessment. Access to the self-assessment is granted for six (6) months. An exam bundle can only be purchased if the candidate has 13 or more weeks of eligibility.

Reinstate non-pay must be completed by 12/31 of the same year the individual was invalidated.

If invalidated for not reporting a recertification worksheet, a reinstatement fee must be paid and the individual must submit a recertification worksheet by audit and upload supporting documentation.

View Payment History and Access Receipts

To view payment history online, click Payment History in the navigation bar on the left.

For a printable PDF receipt, click the **Receipt** option under **Details**.

Request Americans with Disabilities Act (ADA) Accommodations

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 *accommodations@bcsp.org* and should include the type of accommodation(s) the applicant is seeking for the exam they are planning to take through Pearson VUE. Failure to request at the time of exam purchase may impact the ability to have the accommodation(s) provided.

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.