WORK AS A TEAM
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 group management platform allows 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 ................................................. 1
Use the GAM Dashboard .................................................... 4
Update Organization Information ..................................... 8
Link or Unlink an Individual to or from a Group ............ 10
Check Employee/Member Status .................................. 13
Request Permissions from an Employee/Member .......... 14
Reporting ........................................................................... 17
Pay Fees and Make Purchases .................................... 23
View Payment History and Access Receipts ............... 25
Request ADA Accommodations .................................. 26
Additional Information ...................................................... 27
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.

When you log in for the first time, whether it is from GROUPS.BCSP.ORG 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. The employee/member must select Yes for Application records for the GAM to pay fees in the shopping cart. 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 GAM Dashboard is designed to include your personal information as well as the group information. The dashboard screenshot below with the Me tab highlighted displays 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, linked group(s), 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, active credentials held, and pending invoices. A number under Pending Invoices means you have a product(s) in your shopping cart that can be purchased. Products include Annual Renewal Fees, Application Fees, Eligibility Extensions, Exam: Bundle Exams, Exam: Single Exams, Nonpay Reinstatement Fees, Recertification Extensions, Recertification Reinstatement Fees, and Wall Certificates. 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. In addition to wallet cards, the exam passing rate is available for all certifications. Example, 30/50 indicates that 30 of the 50 taking the exam have passed.

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. Clicking 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. You can make other updates at any time.
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.

![](image1)

**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 employee/member 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 employee/member grants permission to view private/personal data, the GAM will be able to view their customer ID, full name, location, and the primary email address on their record- under the Members tab.

If the employee/member grants permission to Application Records, under the Applications/Eligibility tab, the GAM will see the number of pending applications, full name, credential(s), date created, date submitted, submittal number, and status of the application. GAMs can filter by credential(s) or by status. Status categories include: Expired, Expired Eligibility, Pending, Fee Waiver Review, CS Info Needed, CS Review, Exam Eligible, Exam Authorized, Eligibility Extension, App Checkout, App Checkout Waiver, Audit Info Needed, Audit Review and Executive Review.
If the employee/member actively holds or has held the credential, the GAM will be able to see the following items under the **Credentials** tab: credential(s) held (depending on permissions granted), the date the credential was awarded, and the credential’s expiration date. The expiration date is the five-year recertification cycle end date for certifications or the six-year end date for designations. Under the **Level** column, GAMs will see the individual’s credential status: Certified, Designation Awarded, Invalidated–non pay, Invalidated–recertification, Invalid–voluntary, Expired, Expired–no reapply, or Retired. Filters by credential(s) and level are available via 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 are available by credential(s), submittal status, and CS review status.
A GAM can run multiple reports, sort, filter, and download the information/export as a CSV. Available reports include: Current Members, Member History, Application Status, Credential Status, Monthly/Quarterly/Annual Credential Reports, Recertification Status, and Purchase History. **The report information available is dependent on the privacy permissions granted by the individual.**

1. Click on **Reporting** on the left,
2. then select the report you would like to create.
Within each report, the GAM can remove and restore columns by clicking on the column name under columns. Once in a report, the GAM can also select a different report by clicking on the pull-down menu under Report Type. Examples of each report are shown below.

**Current Members** – Report showing employees/members who are linked and are either active, invalidated, or expired.

**Member History** – Report showing employees/members who are no longer actively linked to the group record.
Applications/Eligibility Status – Report displaying employees/members who are linked and showing a status level of their application.

Credential Status – Report showing employees/members who are actively linked along with their credential status level.
Monthly Credential Status – Report showing employees/members who earned a credential in the past month.

Quarterly Credential Status – Report showing employees/members who earned a credential in the past quarter.
Annual Credential Status – Report showing employees/members who earned a credential in the past year.

Recertification Status – Report displaying employees/members along with their recertification worksheet submittal status, due date, date submitted, status of Certification Services (CS) review, and approval date.
Purchase History – Report showing product(s) purchased, dollar amount, purchased for, paid by, payment type, and reference number (credit card number).

If you do not see an employee/member that belongs in your group, it is because the person either needs to be linked to your group or has not granted permission for the GAM to view. If the person needs to be linked, see instructions on page 10 of this guide. To request permissions from an employee/member, see instructions on page 14 of this guide. If you need to remove/unlink someone from your group, see instructions on page 10 of this guide.
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. The employee/member must answer yes to the Application Records on their privacy page in order for the GAM to pay for their fees in the shopping cart.

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. The following example shows one application fee and two annual renewal fees have been added to the shopping cart for payment.
2. 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.

3. 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 their name, customer number, city, state, credential, end date, and level. The screenshot below shows the Annual Renewal Fee product selected with two employees/members with an annual renewal fee.

4. 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.

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

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

![Screenshot of the Group Management interface with employees and payment details](image-url)
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.
Additional Information

Additional Guidelines for Specific Products

Eligibility extensions are available to purchase within 60 or fewer days of an 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 December 31 of the same year an individual was invalidated.

If invalidated for not reporting a recertification worksheet, an individual must pay a reinstatement fee and submit their recertification worksheet and supporting documentation to meet an audit. Upon passing the audit and paying delinquent annual renewal fees must be paid, the credential may be restored.

Status Levels

App Checkout – The application has not been submitted with payment.
App Checkout Waiver – An applicant answered yes to one of the fee waiver questions and the application has not been submitted with payment.
Audit Info Needed – The Certification Services department has reviewed the information provided for an audit but requests additional information before it can be approved or rejected.
Audit Review – An application or recertification worksheet was selected for an audit and is with the Certification Services department for review.
Certified – When an individual passes the exam, they achieve their certification.
CS Info Needed – The Certification Services department has reviewed the application and requests additional information before the application can be approved or rejected.
CS Review – The application has been submitted and is with the Certification Services department for review.

Eligibility Extension – The applicant has paid to extend their application for an additional year.

Exam Authorized – An exam has been purchased and the applicant is able to schedule their exam.

Exam Eligible – The application has been reviewed and approved and the applicant is eligible to sit for the exam.

Expired – The credential no longer valid.

Expired Eligibility – The applicant’s one-year period of eligibility to sit for the exam has run out.

Expired Cannot Reapply – When an individual is invalidated and did not take the necessary actions prior to a December 31 deadline, they become expired and cannot reapply until January 1 of the following year.

Fee Waiver Review – An applicant answered yes to one of the fee waiver questions and the application is with the Certification Services department for review.

Invalid-Non-pay – The credential is invalidated for non-payment of annual renewal fees. (Late fees are assessed on January 1 and February 1. Invalidations take place on March 1.)

Invalid-Recert – The certification is invalidated for not meeting the recertification requirements. (Recertification invalidations are made on August 1.)

Invalid-Recert Audit – An individual’s recertification worksheet was selected for an audit, and it was not submitted with the required documentation. (The certification is invalidated on September 1.)

Pending – An application is not complete or has not been submitted for payment.

Retired – An individual has met the retirement requirements and the certification is no longer active.

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