User Guide for the Atlantic Highly Migratory Species (HMS) Individual Bluefin Quota (IBQ) Online System

September 2017

Disclaimer: Screen shots contained in this document are subject to change. Revisions to this document will be periodically made and posted on the Southeast Regional Office IFQ/IBQ website at:


Atlantic Highly Migratory Species Management Division
National Marine Fisheries Service
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List of Commonly Used Acronyms

ATL  1. Atlantic Tunas Longline, also an abbreviation for the permit number (e.g., ATL-999), or 2. Atlantic (used to refer to the Atlantic Share Category or landing region)
BFT  Bluefin Tuna
FMP  Fishery Management Plan
GOM  Gulf of Mexico (used to refer to the Gulf of Mexico Share Category or landing region)
HMS  Highly Migratory Species
IBQ  Individual Bluefin Quota
IFQ  Individual Fishing Quota
NED  Northeast Distant Area (used to refer to the Northeast Distant Area Share Category)
PIN  Personal Identification Number (your password for logging into the IBQ system)
PSG  Purse Seine Gear (used to refer to quota that was originally allocated to the purse seine fleet)
SERO  Southeast Regional Office
VMS  Vessel Monitoring System

Bluefin tuna size category acronyms:

CFL  Curved Fork Length
YSCH “Young School” – a bluefin tuna that is less than 27” CFL; discard size category
SCH “School” – a bluefin tuna that is 27” CFL to less than 47” CFL; discard size category
LSCH “Large School” – a bluefin tuna that is 47” CFL to less than 59” CFL; discard size category
SMED “Small Medium” – a bluefin tuna that is 59” CFL to less than 73” CFL; discard size category
Atlantic HMS IBQ Program Introduction

Welcome to the online Individual Bluefin Quota (IBQ) system! The IBQ system was developed as part of the management measures implemented under Amendment 7 to the 2006 Consolidated HMS Fishery Management Plan. Pelagic longline fishery participants, purse seine fishery participants, and dealers who purchase from pelagic longline vessels that discard or land bluefin tuna should be prepared to use the online IBQ system in order to go fishing, report dead discards, transfer IBQ allocation between accounts, and complete landing transactions.

If you need information on the IBQ regulations, dealers, pelagic longline fishery participants, and purse seine fishery participants may download dealer and commercial fishery compliance guides on the HMS website at http://www.nmfs.noaa.gov/sfa/hms/compliance/guides/index.html.

Get Your User ID and Personal Identification Number (PIN)

If a User ID and PIN have not already been mailed to you, you will need to contact IBQ Customer Service by email (NMFS.HMS.IBQ@noaa.gov) or by phone (301-427-8591, Monday through Friday, 8:00 am to 5:00 pm, Eastern Time, excluding Federal holidays). User IDs and PINS will only be mailed to the address on file with the Southeast Regional Office (SERO) Permit Office, without exceptions. If you have moved recently or you need to update your address, please call the SERO Permit Office at 1-877-376-4877. If you have not received your User ID and PIN within 5 days, please contact IBQ Customer Service.

Individual Bluefin Quota (IBQ) System Log In and Set-up Instructions

The IBQ system is operated electronically and functions similarly to electronic banking. To log in for the first time, view your IBQ shares and allocation, and become familiar with the operations of the website, please follow the instructions below. Please note that the IBQ system will undergo periodic enhancements in functionality and design. As the online system is refined, some changes to the layout may occur. If you have any questions, please email NMFS.HMS.IBQ@noaa.gov, or call IBQ Customer Service at 301-427-8591.

To log into the system on your computer, start your internet browser (go online), then copy/paste or type https://portal.southeast.fisheries.noaa.gov/cs/main.html into the address/URL bar. The IBQ system is hosted on the SERO Catch Shares Programs website.
Structure of the IBQ Online System – Shareholder and Vessel Accounts

All shareholders have two types of accounts generated for them – Shareholder Accounts and Vessel Accounts. A shareholder account is an umbrella account that contains individual vessel accounts in much the same way that an online bank account may contain checking accounts, savings accounts, and credit card accounts. **You must activate each type of account to be able to view your quota, complete transfers, and finalize landing transactions.**

![Diagram of Shareholder Account and Vessel Accounts]

**Your Shareholder Account Will Allow You To Do the Following:**

- See how much share of the overall bluefin quota has been allocated to you.
- Transfer quota from your vessel account to your shareholder account (and vice versa), or move quota between your vessel accounts (if you own more than one vessel).
- Lease your quota to another individual (i.e., a different shareholder).
- View all of your vessel account data (e.g., landings and allocation transfers) at once in your shareholder account. This may be especially helpful if you own more than one vessel.
- Receive messages from NMFS regarding your account(s) and quota.
- Repay any quota debt accrued by your vessel(s).

**Your Vessel Account Will Allow You To Do the Following:**

- When landing, you are required to work with your fish dealer to verify landing transactions using the PIN associated with your vessel account.
- View available allocation in the vessel account.
- You must be logged into your shareholder account to view landings.
The Public Homepage, which is accessible without logging in, features:

1. Menu bar allows you to navigate to the home page, see additional information, and to obtain forgotten PINs for logging into the system. The View Dealers tab will be periodically updated to show all approved dealers for the IFQ and IBQ programs. The Additional Information tab provides links to important documents, such as Frequently Asked Questions, information on Atlantic Tunas Longline permit transfers, etc. for the IBQ and IFQ programs.

2. ***Log In button.***

3. Important Messages to read before logging on.

4. If you select the BFT Catch Accounting tab, you will see the commercial quotas by share category (quota distributed), current reported catch (quota applied), current amount of quota debt, and quota remaining. The BFT Catch tab shows details of landings and dead discards by region.

5. IBQ customer service phone number and e-mail address are located at the bottom of all pages relevant to the IBQ program. Please note that the page relevant to the IFQ program has contact information for a separate customer support line.
SHAREHOLDER, VESSEL, AND DEALER ACCOUNT FUNCTIONS

Logging In

After clicking on the Log In button in the upper right corner of the homepage a pop-up box will appear (Login Form). To log in to the IBQ system using the Login Form:

1. Enter your User ID. User IDs are usually 4 letters followed by 4 numbers and are NOT case sensitive.
2. Enter your PIN (mailed to you in a separate letter). PINs are case sensitive (upper and lower case must be exact).
3. Your role will appear automatically: “BFT Shareholder”, “BFT Dealer”, or “BFT Vessel”.
4. Read the Terms of Use, then click the Login button to access your account. When you login for the first time, you will be required to change your PIN.

- You must log in as a shareholder first to get your vessel account PIN(s). Your vessel account PIN(s) and User ID(s) are listed in the “Update Account” page (see Finding Your Vessel Account User ID and PIN).
- Dealer account holders will only log in as Dealers, and will never activate a different account.
Personal Identification Numbers (PINs)

You must change your PIN after logging in for the first time or when prompted by the IBQ system. PIN changes are required security measures for your protection; think of your IBQ account like a bank account.

New PINs must be at least 12 characters long and contain at least 3 of the 4 conditions:

- Uppercase letters
- Lowercase letters
- Numbers
- The following special characters: ! @ $ % ^ & * ( ) ? .

Examples:
- IBQpassword1234
- Love$wordfish
- RatherBeF!$HING
Update Account: Provide Email and Secret Questions

From the Homepage, select **My Account** then select **Update Account**, and the screen above will appear. To update your account or find a UserID and personal identification number (PIN):

1. Click on the BFT Shareholder or BFT Dealer account in the table (highlighted in blue when selected).
2. Only click the icon of the lock to view your BFT Shareholder or BFT Dealer account PIN if you would like to update your PIN. **If you click the lock icon, the system will force you to change your PIN.**
3. Enter your email address and check the email flag box to receive IBQ-related messages, such as transaction confirmations.
4. Select two secret questions and provide answers to each of these questions. These secret questions allow you to retrieve your PIN using the Forgot PIN feature on the Catch Shares Program homepage. If you call with specific questions about your account, Customer Service uses these questions to help confirm your identity.
5. Press Submit to update your account.

**NOTE:** When logged in as a BFT Shareholder, you can also find your vessel account PIN(s) on this page (see **Finding Your Vessel Account User ID and PIN**).

**WHY SECRET QUESTIONS?**
Your secret questions allow IBQ Customer Service representatives to easily verify your identity and provide you with account information over the phone. This can save time, especially if you have to wait for NMFS to mail you a new PIN instead of getting it over the phone! Avoid frustration and set up your secret questions!
View Messages

By selecting **Messages** and then **View Messages**, you can see messages sent by NMFS that have information specific to your account or the fishery. Any notices that the allocation in your vessel account is below the minimum to fish in a given area, or warnings that your vessel account has gone into quota debt, will appear in your messages in your shareholder and vessel accounts, if applicable (see *Confirming a Catch Transaction with Vessel PIN* in the dealer section).

**NOTE:** The messages you see may vary depending on whether you are in your shareholder or vessel account.

**NOTE:** You may receive emails from the IBQ system as a result of landing transactions made when there is insufficient quota in the account to fish in a region, or a warning if the landing transaction results in the accumulation of quota debt. If you have any questions regarding these emails please call IBQ Customer Service at 301-427-8591.
Website Contents Under Construction

This is an example of a page in the IBQ system that is under construction. The page is blank, with placeholder text in the upper left corner that describes what you will soon see on this site. Pages under development include: Shareholder account- view allocation ledger summary BFT, view catches ledger, view notifications, view hail outs; Vessel account- view allocation ledger BFT activity, view notifications, view hail outs; Dealer account- view catches ledger, view notifications. This list is subject to change and new functionality and pages will be reviewed in future versions of this user guide.
SHAREHOLDER ACCOUNT

BFT Shareholder Homepage

The BFT Shareholder Homepage Features:
1. The menu bar allows you to access functions within your account.
2. The Important Messages box highlights relevant breaking news in HMS fisheries or regarding the Catch Shares online system.
3. The BFT Shareholder Allocation tab in the center of the screen summarizes the amount of allocation currently in your shareholder and vessel accounts by share category, as well as the amount of quota debt in your vessel accounts. You can scroll down in the table to see your vessel information. Note: In order to populate this table, you may need to click on another menu option and then click back to Home.
4. The BFT Catch and BFT Catch Accounting tabs show the same information as on the public homepage.
5. The Additional Information button at the bottom of the page provides links to important documents for the IBQ program only.
From the BFT Shareholder Homepage, select **Vessels** on the menu bar and then select **View Vessels**

1. The Vessels with Valid Permits table provides a summary of vessels with valid Atlantic Tunas Longline permits. The table includes pertinent information, including vessel number, vessel name, vessel account User ID, and permit number. Your PIN for each of your vessel accounts can be found on the **Update Account** page (via the **My Accounts** tab).

2. The Vessel Allocation table summarizes allocation (pounds) by share category (“ATL”, Atlantic; “GOM”, Gulf of Mexico; “PSG”, Purse Seine) available in each of your vessel accounts. See **Transfer Allocation – Between Shareholder Account and Vessel Account** to transfer allocation from your shareholder account to your vessel account(s).
View Allocation

If you are logged in as a shareholder, you can view the allocations of all your vessels at once. On the menu bar select Allocation then select View Allocation.

Webpage features:

1. The BFT Shareholder Allocation table on the left summarizes your annual allocation (in pounds whole weight) by share category held in the shareholder account. This table will include only allocation that has not been transferred to a vessel account or another shareholder. Allocation may be transferred to your shareholder account from your vessel account or from other shareholder accounts.

2. The Vessel Allocation table on the right summarizes the current allocation in pounds whole weight available in your vessel account(s).

NOTE: You must have a minimum amount of IBQ allocation in the vessel account prior to departing on a trip. While fishing in the Atlantic or NED, this is equivalent to maintaining 275 pounds (0.125 metric tons) in your vessel account. When fishing in the Gulf of Mexico, this is equivalent to maintaining 551 pounds (0.25 metric tons) in your vessel account.
Transfer Allocation – Between Shareholder Account and Vessel Account
Must Be Logged Into BFT Shareholder Account

You may wish to move IBQ allocation between your vessel account and your shareholder account for a variety of reasons, including:

1) You want to lease quota to another permit holder (leases can only be completed through shareholder accounts).
2) You own multiple vessels, and you want to move allocation around between your vessel accounts.
3) You are selling your vessel and therefore must move your allocation out of your vessel account.
4) You are selling your Atlantic Tunas Longline permit and transferring the associated allocation to the new permit holder’s shareholder account (for further information on permit transfers and vessel sales, see Appendix A).

In order to transfer quota, select Allocation and then Transfer Allocation BFT.
Selecting Allocation and then Transfer Allocation BFT will display this page. There are five steps in transferring allocation:

1) Selecting the type of allocation transfer
2) Selecting the account that will receive the transfer
3) Selecting how much quota to transfer
4) Selecting a reason for the allocation transfer
5) Review, submit and receive confirmation of the transfer.

*Note: If you move the cursor over a row, it will temporarily turn a darker shade of blue. You must click on the row in order to select it. The row will turn and stay dark blue when it is selected.*

To select an allocation transfer that will allow you to move allocation between your vessel account and your shareholder account (or vice versa), select either the first or second row under Step #1:

**Step 1: Select the type of allocation transfer...**
If you are transferring IBQ allocation from your shareholder account to your vessel account:

Step #2 will look like this:

Step 2: Select a vessel account or shareholder account in the table below. When selected, the account will be highlighted in blue...

In the Search box below, type the first few characters of the UserID or Shareholder name to filter the list.

<table>
<thead>
<tr>
<th>To My Vessel Account</th>
<th>Vessel</th>
<th>DLL ATL</th>
<th>DLL GOM</th>
<th>PSG ATL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vessel Account ID</td>
<td>Vessel Name</td>
<td>Current amount of IBQ in the vessel account</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You will need to select the vessel account that will receive the IBQ allocation by clicking on it with your mouse. A selected vessel account will be highlighted in dark blue and will remain dark blue when you move your mouse away from the table.

Step #3 will look like this:

Step 3: Enter allocation transferred for each share category by clicking in the Transfer Pounds column, changing the value and clicking the Enter key...

<table>
<thead>
<tr>
<th>From My Shareholder Account</th>
<th>Share Category</th>
<th>Current Allocation</th>
<th>Transfer Pounds (whole weight)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shareholder Account ID</td>
<td>ATL</td>
<td>50</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>GOM</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>PSG</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

In this example, you may wish to move all 50 pounds of Atlantic IBQ allocation from your shareholder account to your vessel account (you can select any of the share categories by clicking on them and turning the row dark blue). Then put your mouse over the last cell in the share category row (column heading “Transfer Pounds (whole weight)”) and either use the arrow buttons to incrementally add 1 pound or subtract 1 pound to the amount you wish to transfer, or select the “0” with your mouse and manually change that to the total amount of IBQ allocation you wish to transfer.

Step #4: You are required to select a reason for the allocation transfer. When you are transferring between your shareholder account and the related vessel account(s), you can select “transfer to related account.”
Step 5: Select “Submit” at the bottom of the page.

**Step 5:** Click the Submit button to complete the transfer or click the Reset button to clear all selections...

Submit  |  Reset

You will then see a summary pop up that reviews the transfer. If the information is accurate, select “Submit”.

Finally, you will see a confirmation screen:
If you are transferring IBQ allocation from your vessel account to your shareholder account:

Step #2:
Step 2: Select a vessel account or shareholder account in the table below. When selected, the account will be highlighted in blue...

   In the Search box below, type the first few characters of the UserID or Shareholder Name to filter the list

   Search

<table>
<thead>
<tr>
<th>Vessel Account ID</th>
<th>Vessel Name</th>
<th>Amount of IBQ Allocation Available for Transfer</th>
</tr>
</thead>
</table>

You will need to select the vessel account that will receive the IBQ allocation by clicking on it with your mouse. A selected vessel account will be highlighted in dark blue and will remain dark blue when you move your mouse away from the table.

Step #3:
Step 3: Enter allocation transferred for each share category by clicking in the Transfer Pounds column, changing the value and clicking the Enter key...

<table>
<thead>
<tr>
<th>From My Vessel Account</th>
<th>Share Category</th>
<th>Current Allocation</th>
<th>Transfer Pounds (whole weight)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account User ID</td>
<td>ATL</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>GOM</td>
<td>1000</td>
<td></td>
<td>1000</td>
</tr>
<tr>
<td>PSS</td>
<td>0</td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>

In this example, you may wish to move all 1000 pounds of GOM IBQ allocation from your vessel account to your shareholder account. Put your mouse over the last cell in the share category row (column heading “Transfer Pounds (whole weight)”) and either use the arrow buttons to incrementally add 1 pound or subtract 1 pound to the amount you wish to transfer, or select the “0” with your mouse and manually change that to the total amount of IBQ allocation you wish to transfer. If you are moving 1000 pounds you would likely prefer to highlight the “0” and manually enter 1000.

Step #4: You are required to select a reason for the allocation transfer. When you are transferring between your shareholder account and the related vessel account(s), you can select “transfer to related account.”
Step #5: Then Select “Submit” at the bottom of the page.

**Step 5: Click the Submit button to complete the transfer or click the Reset button to clear all selections...**

Submit  Reset

You will then see a summary pop up that reviews the transfer. If the information is accurate, select “Submit”.

![Review Allocation Transfer](image)

Step 6: Click the Submit button to complete the transfer or click the Cancel button to return to the Allocation Transfer form...

WARNING: THE ALLOCATION TRANSFER IS NOT SUBMITTED UNTIL YOU CLICK THE SUBMIT BUTTON!

Submit  Cancel

Finally, you will see a confirmation screen:

![Allocation Transfer Confirmation](image)

Below is your confirmation code for this allocation transfer. Save this code for your records.

**Confirmation code:**

XX - 111111-22

Print Confirmation  Close
Transfer Allocation – Shareholder Account to Shareholder Account (i.e., a Lease of Quota)

You may need to move IBQ allocation from your vessel account into your shareholder account before you can complete a shareholder to shareholder IBQ allocation transfer. See Transfer Allocation - Between Shareholder Account and Vessel Account for instructions on how to do this.

To select an allocation transfer that will allow you to move allocation between your shareholder account and another permit holder’s shareholder account, select the third row under Step #1:

**Step 1: Select the type of allocation transfer...**

- From my shareholder account to another shareholder’s account
- From my shareholder account to my vessel account
- From my vessel account to my shareholder account
- From my shareholder account to another shareholder’s account

**Step #2: Select a shareholder account that will receive your allocation.** A selected account will be highlighted in dark blue and will remain dark blue when you move your mouse away from the table:

**Step 2: Select a vessel account or shareholder account in the table below. When selected, the account will be highlighted in blue...**

<table>
<thead>
<tr>
<th>To Shareholder’s Account</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shareholder Acct #1</td>
<td>LoveToFish Corporation</td>
</tr>
<tr>
<td>Shareholder Acct #2</td>
<td>Tuna LLC</td>
</tr>
<tr>
<td>Shareholder Acct #3</td>
<td>Bob's Burgers and Fish, LLC</td>
</tr>
<tr>
<td>Shareholder Acct #4</td>
<td>Fishy Corps</td>
</tr>
</tbody>
</table>

**Step #3: Select the amount of pounds and the transfer price per pound for each share category.** You will be able to manually select and edit fields within the “Transfer Pounds (whole weight)” and the “Transfer Price per Pound” columns. Note that you can transfer up to the maximum amount of quota listed under “Current Allocation” for each share category.
Step #4: You are required to select a reason for the allocation transfer. Most shareholder to shareholder transfers are for the lease/sale of allocation to another shareholder.

Step #5: Select “Submit” at the bottom of the page.

You will then see a summary pop up that reviews the transfer. If the information is accurate, select “Submit”.

Step 6: Click the Submit button to complete the transfer or click the Cancel button to return to the Allocation Transfer form...

WARNING: THE ALLOCATION TRANSFER IS NOT SUBMITTED UNTIL YOU CLICK THE SUBMIT BUTTON!
Finally, you will see a confirmation screen:

```
Allocation Transfer Confirmation

Below is your confirmation code for this allocation transfer. Save this code for your records.

Confirmation code:
XX - 111111-22

Print Confirmation  Close
```


Find Shareholders Interested in Leasing IBQ

IBQ Customer Service maintains a list of Atlantic Tunas Longline permit holders and Purse Seine participants interested in leasing IBQ allocation (to or from another permit holder) in order to assist permit holders in locating available IBQ allocation. Permit holders/participants that would like to be included on this list should provide Customer Service with their name and contact information.

The list of names and contact information will be shared with other interested permit holders upon request. If you are interested in being put on this list, or want to get a copy of this list of permit holders, please email IBQ Customer Service at: NMFS.HMS.IBQ@noaa.gov. Please be sure to indicate in your email if you are interested in leasing quota from fishery participants or you would like to lease your current quota to other fishery participants. Permit holders electing to be placed on this list will need to email IBQ Customer Service if/when they wish to be removed from the list.
Select **Allocation** and then **View Allocation Ledger BFT Activity** to view the above webpage.

1) Select the year.
2) Select the allocation category (ATL, GOM, PSG, or NED).
3) Click Submit.
4) Your allocation information will appear in the table. If you have more than one vessel associated with your shareholder account, each vessel will appear in its own column.
5) All shareholder, vessel, dealer, and system accounts are noted in the table using the User ID followed by a letter.

In this example, on 12/14/15, shareholder SHAR9876 transferred in (leased) 500 lb of allocation from shareholder COMP3456 (line 1). SHAR9876 transferred 212 lb of allocation from their shareholder account to their vessel account VESS1234 (line 2). Also on 12/14/15, vessel VESS1234 landed a 261 lb bluefin tuna to dealer DEAL5234. The vessel account had 212 lb of allocation available, so the landing is noted as -212 lb Catch (line 3) and 49 lb Quota Debt (line 4). On 12/31/15, the 49 lb of quota debt was resolved (noted QD Pay) using available allocation; this allocation goes to the Catch Share System (line 5). The allocation remaining in shareholder and vessel accounts at the end of the year is removed by the Catch Share System (Reset; line 6).
View Shares

On the menu bar select **Shares** then select **View Shares**. This page displays the percent shares (i.e., percent of the annual quota) you hold for each share category.
On the menu bar select **Shares** then **View Share Ledger BFT**. This page shows your IBQ shares on your permits and any changes to your shares (such as if you transfer a permit and its associated shares to another permit holder). If you own multiple permits, you will be able to view each of your IBQ shares on this page.
View Catches

When you are logged in as a “BFT Shareholder”, you can view the catches associated with all of your vessels at one time. Select Catches and View Catches to see all of the landings and dead discards associated with your vessel accounts.

Webpage features:
1) A complete list of all the catches associated with your vessel account(s). If you wish to see the details of a particular catch, select the row in the table by clicking on it with your mouse (make sure it is highlighted in dark blue and stays dark blue when you move your mouse off the table).
2) Details of selected catches, including the date, dealer, confirmation number, and vessel and shareholder information.
3) After selecting a specific catch, you can view more details about what was landed or discarded dead – species, share category (GOM, ATL, PSG, NED), number of pounds, etc.

You can track the resolution of quota debt for each catch on this page. The example below shows the tables at the bottom of this page populated to reflect a simulated 1,000 lb landing of Atlantic category bluefin tuna made on 3/17/2015. The amount of IBQ allocation in the vessel account (919 lb ATL) was not enough to cover this landing, and the remaining 81 lb
was counted as “quota debt” by the IBQ system. On 12/31/2015, the shareholder resolved the quota debt (“QD pay”).

<table>
<thead>
<tr>
<th>Catch Detail</th>
<th>Catch Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Species</strong></td>
<td><strong>Share Category</strong></td>
</tr>
<tr>
<td>BLUEFIN TUNA</td>
<td>PLL ATL</td>
</tr>
<tr>
<td>1000</td>
<td>PLL ATL</td>
</tr>
<tr>
<td>LANDING</td>
<td>PLL GOM</td>
</tr>
</tbody>
</table>
Select **Catches** and **View Quota Debt Ledger** to view any quota debt associated with your permit(s).

1) Select a permit from the drop down list. The quota debt information will be populated in the table, including permit, date, activity, vessel, shareholder, and type of allocation.

2) Any catch transaction(s) that resulted in quota debt is marked “Catch” under Activity.

3) Any resolution of quota debt is marked “QD Pay” (quota debt pay) under Activity.

In this example, the shareholder resolved ATL quota debt using GOM allocation, and the GOM allocation is marked as “Transfer” under Activity.
Resolve Quota Debt MidYear

IBQ Shareholders can resolve quota debt accrued by their vessel by (a) transferring a sufficient amount of allocation into their vessel account and (b) resolving the quota debt transaction(s) in the IBQ system online. ATL pelagic longline quota debt can be resolved using ATL allocation, GOM pelagic longline allocation, or purse seine (PSG) allocation. GOM quota debt can only be resolved using GOM allocation.

**Please note that allocation must be in the vessel account to resolve the debt.** You may need to move allocation from your Shareholder account to your Vessel account in order to resolve your quota debt (see *Transfer Allocation – Between Shareholder Account and Vessel Account*).

An IBQ Shareholder can log into their shareholder account to resolve quota debt in their vessel account(s). From the main menu, go to **Catches** then **Resolve Quota Debt MidYear**. You will see the below screen.

1) In Step 1, click on the table row containing the vessel account with quota debt (BFTV1234 in this example). Your selection will be highlighted in dark blue (see below), and should remain highlighted in dark blue when you move your mouse away from the table. Once the vessel is selected, the corresponding information will appear in the tables called “Step 2” and “Table 1” (shown below), showing that vessel’s quota debt transaction(s) and the current allocation available in the vessel account.
2) In the “Step 2” table, select the catch transaction associated with the quota debt that you wish to resolve (BL111111112 in this example). Once the catch is selected, it will be highlighted in dark blue, and the information will show up in Table 2 (see above). If there is sufficient allocation available (Quota Debt Pounds equal to Available Allocation) and that allocation is from the appropriate share category (ATL, GOM, or PSG), you will see OK under Sufficient Allocation (green arrow). Also, the Submit button will become available to click.

3) In Step 3, click Submit.

If you do not have sufficient allocation available in the vessel account, or the available allocation is not from the appropriate share category, you will see NOT OK under Sufficient Allocation (red arrow) and you will not be able to click on the Submit button (i.e., it will be grayed out, see below). In the below example, the shareholder cannot resolve GOM quota debt using ATL allocation.
Resolve Quota Debt Mid Year

Step 1: Select a BFT Vessel with Quota Debt.

<table>
<thead>
<tr>
<th>AccountID</th>
<th>Vessel Account</th>
<th>Vessel</th>
<th>Catches</th>
<th>Quota Debt Rounds</th>
<th>Permit</th>
<th>LAR Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1234</td>
<td>BFTV1234</td>
<td>Vessel 123456</td>
<td>1</td>
<td>51</td>
<td>ATL-001</td>
<td>001</td>
</tr>
</tbody>
</table>

Step 2: Select a Catch with Quota Debt for selected BFT Vessel.

<table>
<thead>
<tr>
<th>Confirmation Number</th>
<th>Catch Date</th>
<th>Region</th>
<th>Share Category</th>
<th>Quota Debt Rounds</th>
<th>Original Vessel</th>
</tr>
</thead>
<tbody>
<tr>
<td>BL11111111111</td>
<td>04/19/2016</td>
<td>GOM</td>
<td>GOM</td>
<td>51</td>
<td>Vessel 123456</td>
</tr>
</tbody>
</table>

Step 3: Click Submit to Resolve Quota Debt as shown in Table 2.

Table 1: Current allocation for selected BFT Vessel.

<table>
<thead>
<tr>
<th>Account</th>
<th>Share Category</th>
<th>Allocation Rounds</th>
</tr>
</thead>
<tbody>
<tr>
<td>BFTV1234</td>
<td>ATL</td>
<td>1400</td>
</tr>
<tr>
<td>BFTV1234</td>
<td>GOM</td>
<td>0</td>
</tr>
<tr>
<td>BFTV1234</td>
<td>PSG</td>
<td>0</td>
</tr>
</tbody>
</table>

Table 2: Allocation To Be Used to Resolve Quota Debt. If Sufficient Allocation is OK, click Submit to Resolve Quota Debt for the selected Catch.

<table>
<thead>
<tr>
<th>Account</th>
<th>Confirmation Number</th>
<th>Region</th>
<th>Quota Debt Rounds</th>
<th>Available Allocation</th>
<th>Sufficient Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>BFTV1234</td>
<td>BL11111111111</td>
<td>GOM</td>
<td>51</td>
<td>0</td>
<td>NOT OK</td>
</tr>
</tbody>
</table>
Account Status

From the BFT Shareholder Account Homepage, select My Account on the menu bar then select Account Status.

This page displays important information that is related to the account.

1. The top portion of the page displays the account holder names, mailing address, account validity date, and the citizenship status.
2. This table displays information relevant to Atlantic Tunas Longline permits associated with the account. It can be used as a reminder for renewing your permit.
Finding Your Vessel Account User ID and PIN (from Shareholder Account)

You must first be logged in as a “BFT Shareholder” in order to get your vessel account PIN. When logged in as a “BFT Shareholder”, select My Account then select Update Account.

To update your account or find a User ID and personal identification number (PIN):
1. Click on the BFT vessel account in the table (highlighted in dark blue when selected). This is your UserID for your BFT vessel account. Some shareholders will have multiple BFT vessel accounts.
2. Once you have selected the UserID, click the icon of the lock to view your BFT vessel account PIN. To change your PIN, delete the old PIN and type a new PIN, then retype the PIN to confirm the change in the space below. The PIN must meet the PIN criteria shown on the page.
3. Enter your email address and check the email flag box to receive IBQ-related messages, such as transaction confirmations.
4. Select two secret questions and provide answers to each of these questions. These secret questions allow you to retrieve your PIN using the Forgot PIN feature on the Catch Shares Program homepage. If you call with specific questions about your account, Customer Service uses these questions to confirm your identity. Completing this information will save you time if you need to troubleshoot issues relating to your User ID and PIN.
5. Press Submit to update your account.

You can also update your vessel account information (email address, secret questions) when you log into your BFT vessel account.
NOTE: If you do not currently have a vessel associated with your Atlantic Tunas Longline permit (e.g., your permit is in NOVESID status), you will not see a BFT vessel account. You will need to contact Customer Service to create a BFT vessel account when your permit is associated with a vessel.

YOUR VESSEL PIN IS REQUIRED TO BE ENTERED INTO THE IBQ SYSTEM IN ORDER TO FINALIZE LANDING TRANSACTIONS WITH A DEALER.

Write down or memorize your PIN so that you or the vessel operator can provide it at the time of landing to a dealer to authorize and affirm the completion of a transaction against the available allocation in your vessel account.

See Confirming a Catch Transaction with Vessel PIN for more information
The BFT Vessel Account Homepage Features:

1. The menu bar allows you to access functions within your vessel account. Note that functionality within a vessel account is more limited than within a shareholder account.
2. The Important Messages box will highlight relevant breaking news in HMS fisheries.
3. The BFT Catch and BFT Catch Accounting tabs show the same information as on the public homepage. The BFT Catch tab shows details of landings and dead discards by region. The BFT Catch Accounting tab shows the commercial quotas by share category (quota distributed), current reported catch (quota applied), current amount of quota debt, and quota remaining.
4. The Additional Information button at the bottom of the page provides links to important documents for the IBQ program only.
View Vessel Allocation

If you are logged in as a “BFT Vessel”, you can view the allocation and transfers associated with that particular vessel. Select Allocation and then select View Vessel Allocation to see the above webpage.

Webpage Features:
1) The first table provides a summary of the current vessel allocation by share category.
2) The second table shows you a summary of all of the allocation that has been transferred in to this vessel account. Allocation can be transferred from your shareholder account to your vessel account. Annual allocation, or allocation from inseason quota transfers, appears as allocation transferred in from “System, IFQ.”
3) The third table shows a summary of all allocation that has been transferred out of the vessel account. Any allocation transfers must occur via the shareholder account that is associated with this vessel account.
DEALER ACCOUNT

BFT Dealer Account Homepage

The BFT Dealer Account Homepage Features:
1. The menu bar allows you to access functions within your dealer account.
2. The Important Messages box will highlight relevant breaking news in HMS fisheries.
3. The **BFT Catch** and **BFT Catch Accounting** tabs show the same information as on the public homepage. The **BFT Catch** tab shows details of landings and dead discards by region. The **BFT Catch Accounting** tab shows the commercial quotas by share category (quota distributed), current reported catch (quota applied), current amount of quota debt, and quota remaining.
4. The **Additional Information** button at the bottom of the page provides links to important documents for the IBQ program only.
Completing a Catch Transaction

Log in to the IBQ system as a BFT Dealer. On the menu bar select **Catches** then select **Catch Transaction**. Then do the following:

1. Enter trip information, including the vessel account of the vessel selling the fish, the region the fish was caught (GOM or ATL), and the Landing Date. The Transaction Date is automatically recorded when a transaction is submitted.

2. In the table, select a fish tag prefix (BT90, BT80, or BT05), and enter the fish tag number, the unit of measure (whole or dressed), and pounds for all bluefin landed. Select whether the bluefin was caught in the NED Region. **All bluefin must be marked with a fish tag – if you do not have any fish tags then you may not purchase the bluefin tuna.** If you need fish tags, please call 978-281-9260 to request tags.

3. Fishermen are required to report dead discards of undersized BFT through landing transactions. These should be reported by size class as follows:
   a. **YSCH** – “Young School” (less than 27” curved fork length, CFL)
   b. **SCH** – “School” (27” to < 47” CFL)
   c. **LGSCH** – “Large School” (27” to < 59” CFL)
   d. **SMED** – “Small Medium” (59” to < 73” CFL)
   e. **All bluefin bigger than 73” CFL are legal sized and, if dead, must be retained, landed, and recorded in step 2.**

4. Select Submit to finalize the transaction. You will see the catch transaction confirmation screens below.
Confirming a Catch Transaction with Vessel PIN

Vessel owners or operators are required to enter their vessel account PIN to confirm an Atlantic bluefin tuna catch transaction entered by a dealer (similar to signing the traditional bluefin tuna landing card). The purpose of the vessel PIN requirement is to provide the vessel owner or operator the opportunity to confirm that the correct amount and type of bluefin allocation is being debited from the correct vessel account to account for both landings and dead discards of bluefin tuna. A shareholder can find their vessel account PIN by logging into their shareholder account and going to “Update Account” (see Finding Your BFT Vessel Account User ID and PIN).

When a dealer enters a bluefin catch transaction (landing or dead discard) in the IBQ System and hits Submit (step 4 above), the below pop up screen will appear asking for the vessel account PIN. The vessel owner or operator will then need to enter their vessel account PIN and click “PIN Confirmation.”

Once the correct PIN is confirmed, the dealer will be able to click “Final Confirmation” (see below).
This completes the transaction and brings the dealer to the below Catch Transaction Confirmation screen.

<table>
<thead>
<tr>
<th>Catch Transaction Confirmation</th>
</tr>
</thead>
<tbody>
<tr>
<td>BFT Dealer:</td>
</tr>
<tr>
<td>BFT Vessel Account:</td>
</tr>
<tr>
<td>BFT Shareholder:</td>
</tr>
<tr>
<td>Region: GOM</td>
</tr>
<tr>
<td>Landing Date: 7/4/16</td>
</tr>
<tr>
<td>Transaction Date: Wednesday, 7/4/2016 11:26 AM</td>
</tr>
<tr>
<td>Conf. Number:</td>
</tr>
<tr>
<td>Total Pounds (whole): 301</td>
</tr>
<tr>
<td>Trip Ticket Number:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Allocation Usage Detail (whole weight)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share Category</td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td>PLL GOM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Catch Detail (whole weight)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Species</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>BLUEFIN TUNA</td>
</tr>
<tr>
<td>BLUEFIN TUNA</td>
</tr>
</tbody>
</table>

1) Details regarding the catch transaction will be autofilled on the top part of the page.  
2) The Allocation Usage Detail table shows the share category of bluefin tuna caught.  
3) The Catch Detail table at the bottom shows the summary of the catch transaction. In addition to pounds of bluefin tuna landed, the table provides you with an estimate of poundage that will be deducted from a vessel account’s IBQ to cover reported dead discards of bluefin tuna.

In the example shown above:  
- One bluefin tuna was landed that weighed 250 pounds and had Fish Tag #9999  
- One school (27” to < 47” CFL) bluefin tuna was reported discarded in this landing transaction. A total of 51 pounds will be deducted from this vessel’s IBQ to cover the dead discard. This estimate is based on the average weight of a school bluefin in the Gulf of Mexico.  
- A total of 301 pounds (250 lb + 51 lb) would be deducted from the Gulf of Mexico (GOM) IBQ allocation assigned to this vessel account. You would see this deduction when logged into both your vessel account and your shareholder account.
If the catch transaction will result in the allocation balance in the vessel account being below the minimum allocation required to depart on a fishing trip (551 lb in the Gulf of Mexico; 276 lb in the Atlantic) or the vessel account going into quota debt, a Notice will appear on the Catch Transaction PIN Confirmation pop up screen, as shown below. If the catch transaction is being completed for a vessel account that is already in quota debt or whose balance is already below the minimum allocation, a Warning will appear on the vessel PIN confirmation pop up screen.

The shareholder will also receive messages in their IBQ shareholder and vessel accounts (below) as well as through their VMS unit.
View Catches

When logged in as a “BFT Dealer”, you can view the catches associated in the IBQ system with your Dealer Account.

Select **Catches** and **View Catches** to see all of your catch transactions.

Webpage features:

1) A complete list of all of your catch transactions. If you wish to see the details of a particular catch, select the row in the table (make sure it is highlighted in dark blue).

2) Details of selected catches, including the date, dealer, confirmation number, and vessel and shareholder information.

3) After selecting a specific catch, you can view more details about what was landed or discarded dead – species, share category (GOM, ATL, PSG, NED), number of pounds, etc.
APPENDIX A: Atlantic Tunas Longline Permit Transfers And The Individual Bluefin Quota (IBQ) System

This worksheet summarizes the steps that must occur after the transfer of an Atlantic Tuna Longline permit by both the Transferor (“seller”) and Transferee (“buyer”) in order to access shares and allocation in the Online IBQ Program and participate in the pelagic longline fishery.

A permit transfer occurs whenever the ownership on a permit changes (including when a new person or business entity is added to a permit) and/or the vessel a permit is assigned to changes.

Please note that shares and quota debt are associated with a permit and will be transferred to the new permit holder upon transfer of the permit. IBQ Allocation is distributed to shareholders at the start of the year or as a result of any mid-year quota increases, and expires at the end of the calendar year.

<table>
<thead>
<tr>
<th>Participant</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• You must transfer your allocation from your vessel account to your shareholder account. If you sold your vessel, the vessel account cannot be moved to the new owner in the IBQ system until the allocation has been removed from the vessel account by the previous owner. You cannot harvest allocation without a valid permit/vessel combination.</td>
</tr>
</tbody>
</table>
|             | • If allocation is part of the bill of sale:  
|             | o Transfer the allocation from the seller’s shareholder account to the new permit holder’s shareholder account. NMFS does not transfer allocation; this must be initiated by the Transferor.  
|             | o If the new owner is a new IBQ participant, you must wait until the account has been activated by the new shareholder.  
|             | o If the new owner has an activated account, you may transfer allocation immediately. |
|             | • If allocation is not part of the bill of sale:  
|             | o You may transfer your allocation to other shareholders in the IBQ system.  
|             | o You may retain your allocation, but will not be able to harvest the allocation until it is associated with a properly permitted vessel. The allocation will expire at the end of the year. |
|             | • If you do not have an IBQ shareholder account:  
|             | o Call IBQ support at 301-427-8591 to request a shareholder account. Your UserID and PIN will be mailed to you.  
|             | o Log into your IBQ account and set up your profile, including secret questions.  
|             | o If the permit has associated shares, the shares will be transferred to your shareholder account by IBQ staff. |
|             | • If allocation is part of the bill of sale:  
|             | o After the vessel account and eligible permit are associated with your new shareholder account, notify the transferor that your shareholder account can now receive allocation.  
|             | o The Transferor must initiate the allocation transfer and then the allocation will appear in your shareholder account. NMFS will not transfer allocation between shareholder accounts. |
|             | • Prior to going fishing, allocation must be obtained and transferred into your vessel account. |
| IBQ Customer Support | • IBQ staff will monitor permit transfers. |
|             | • After allocation is removed from a vessel account, IBQ staff will move the vessel account to the new owner/lessee’s shareholder account. |
|             | • IBQ staff will mail the new IBQ participant an introductory packet containing the UserID & PIN. |

Starting in 2016: All IBQ participants must repay quota debt and have the minimum amount of IBQ allocation (Atlantic = 0.125 mt; Gulf of Mexico = 0.25 mt) in vessel accounts before departing on a trip.

Permit Transfer Questions: http://sero.nmfs.noaa.gov/permits or (877) 376-4877

IBQ Questions: (301) 427-8591 or nmfs.hms.ibq@noaa.gov