

# MICROSOFT PARTNER INCENTIVES

## Incentive Program Guide

August 15<sup>th</sup>, 2020 – June 30<sup>th</sup>, 2021

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# 1 Overview

Whether your customers are doing business on-premises, in the cloud, or in a hybrid environment, the Solution Assessment Incentive Program supports partner profitability and growth through shared interest in Customer cloud migrations. This document is intended to help our Solution Assessment partners understand the processes for participating in the Incentives program for FY21.

Through the selective funding of qualified customer engagements, we will introduce customers to best practices, tools, resources and partners who can help them understand long-term license management, cost effective utilization of their deployed investments, and a clear path to reach their desired business strategy.

These incentive funds are intended to encourage new customer cloud acquisition and consumption growth opportunities for partners who have met the Solution Assessment Incentive partner eligibility requirements provided in this guide.

## 1.1 FY21 Solution Assessment Incentive Program Guide

This guide provides incentive policies and program rules, including:

- Solution Assessment Types
- The Solution Assessment Incentive Process
- Partner Requirements for Eligibility
- Calculation and Payment Expectations
- Partner Support and Escalation Processes

All information presented will be treated as Microsoft confidential information and is subject to the terms of your Non-Disclosure Agreement (NDA) with Microsoft through your Channel Partner Agreement or [Microsoft Partner Network \(MPN\) Agreement](#). Customer data privacy is important to Microsoft and all materials collected or communicated are treated in accordance with the privacy and data protection (Section 5) in the MPN Agreement.

The information contained within this guide may be subject to change.

**Microsoft Solution Assessments** are based on a set of industry standard best practices that incorporate proven strategies for managing and optimizing an organization's IT assets.

Implementing these practices protects a customer's investment by helping identify the software/hardware assets they have, where they are running, and if they are being used efficiently.

These incorporate a set of programmatic business processes that provide a methodical means to the effective management, control, and protection of software assets within an organization. The data and insights gathered are used to develop specific business solutions that meet customers' needs and objectives.

Customers that implement these practices see many benefits, including:

- Better business intelligence and control over their IT infrastructure
- Reduced costs through effective license and infrastructure optimization
- Increased security and lower risk exposure
- Improved user productivity and better cloud governance through process optimization

As hybrid cloud solutions become more common, and with customers considering transitioning some or all of their IT infrastructure to the cloud, it is important to have a clear understanding of any impact such changes may have on how they license, manage, and consume cloud usage within their environment.

## Solution Assessment Incentives and Customer Privacy

Customer data privacy is important to Microsoft and all materials collected or communicated are treated in accordance with the [Microsoft Privacy Policy](#) and data protection requirements in the MPN Agreement (section 5).

Partners will not disclose any personal data to Microsoft or any affiliate of Microsoft in connection with any assessment, except for limited information about the customer that may be reflected on the Letter of Engagement (LOE) or the final report delivered to the customer (if and to the extent those are submitted to Microsoft in connection with a request to receive any channel incentives).

With respect to any customer data that is disclosed to Microsoft, any Microsoft affiliate by or on behalf of a partner will obtain any and all necessary consents from the customer and any personnel and will be responsible for disclosing such customer data only to the extent permitted by and in compliance with any applicable law.

Globally, there are many local laws and rules that govern the type, use, and transmission of Microsoft Product inventory data collected from our customers. These regulations can be applied uniformly to a market or be focused on certain industries or sectors. For engagements with entities having laws or regulations preventing the consent of a customer to share the final assessment report, Solution Assessment Incentives are not available.

## 1.2 Assessment Types

The Solution Assessment Incentive Program engagement types enable partners to deliver value, be it cloud specific, device oriented, or security related. By helping their customers understand their deployed investments capabilities, this program helps customer's in their transition to a modern cloud operating platform that is in alignment with their strategic organizational goals and objectives.

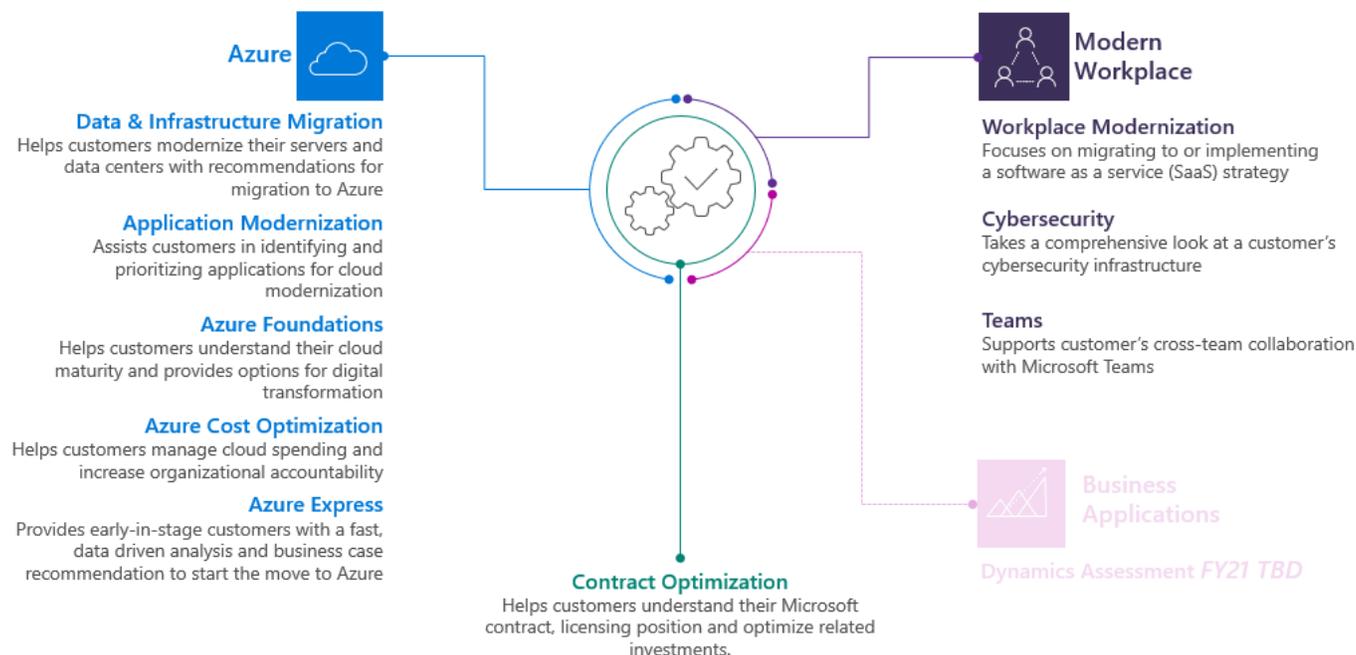
A detailed Statement of Work (SOW) for each of these assessment types can be found in the resource links located in the [Solution Assessment Partner Portal](#). Therein, descriptions of specific activities and outcomes are provided, including required data collection, recommended tools, customer inputs, and final deliverables to both the customer and Microsoft. It is critical that you deliver to the specific expectations articulated in the SOW to be eligible for payment in this program. Alternatives to the defined SOWs are not eligible for this incentive program; however, when agreed upon by the customer and the Microsoft Solution Assessment Specialist (SAS), these SOWs may be modified to fit the customer opportunity.

## Solution Assessment Types

Solution Assessment Incentive Program engagement types, descriptions, and resources.

**Note:** Cloud Economics, SAP on Azure, Data Optimization, Infrastructure Optimization and Azure Cost Control have been retired on August 15<sup>th</sup>, 2020. See FY21 portfolio list below.

# FY21 Solution Assessments



For more information, See the [MPN Solution Assessment page](#).

Name	Description
<b>Data &amp; Infrastructure Migration</b>	Helps customers modernize their server and data center environments and prioritize their workloads and applications to transition to the cloud. Use this engagement to assess current deployments and determine optimal usage on premises or in the cloud highlighting Lift & Shift migrations to Azure
<b>Application Modernization</b>	Assist customers to identify and prioritize applications for cloud modernization. Targeted towards customers who are looking to move applications to the cloud but need support in understanding which applications to move first and how to migrate.  <b>SAP on Azure</b> falls under this category of assessment. Get help prioritizing your current SAP server workloads and applications for transition to the cloud with insights on the business, cost, and technology benefits of your move of SAP to Azure.
<b>Azure Foundations</b>	Help customers understand their cloud maturity and provide steps to digitally transform. This is a consultative assessment to help the customer evaluate their options and capabilities for digital transformation that align with their current cloud maturity and strategic plans.
<b>Azure Cost Optimization</b>	Helps customers optimize their Azure spending in a new cloud subscription world. Manage cloud spending, and increase organizational accountability with insights, analysis, and recommendations to improve financial governance of Azure solutions.
<b>Azure Express</b>	Provides customers with a fast evaluation of their cloud capabilities, including key blockers to cloud migrations. Provides recommendations for next steps to cloud deployments, including related comparative cost analyses and benefits of migration.
<b>Workplace Modernization</b>	This assessment provides customers with visibility into their desktop and on-premises environments with a view to simplify cloud adoption and reduce risk, while helping them improve end user productivity. Deliverables include a cloud roadmap that highlights prioritized migration recommendations and opportunities for Surface devices solutions.

<b>Cybersecurity Assessment</b>	Provides customers with a view of their IT estate to identify areas of potential risk and provide guidance on cybersecurity programs and policies to help enable good identity and security data management practices. The engagement provides a full inventory that can be used as the foundation for a more in-depth organizational security assessment.
<b>Teams Assessment</b>	The Teams Assessment provides the customer with an analysis of their current end-to-end IT estate as well as will providing insights into the current collaboration and communication scenarios.
<b>Contract Optimization</b>	Provides a complete view of current Microsoft deployments with recommendations for the right contract licensing to support customers' business strategy. Deliverables include insights from legacy systems and software licensing, to how to best use current technology and how to make licensing decisions to fit our customer's needs. The aim is to maximize our customer's technology investments to support their organization's innovation and growth.
<b>Dynamics Assessment (TBD FY21 H2)</b>	The Solution Assessments Program will be supporting pilots for Dynamics in FY21 H1. These assessments will not be eligible for Solution Assessments Incentive funds. A new SOW, and BoM will be released at the time this new assessment becomes available for general availability. (TBD FY12 H2)

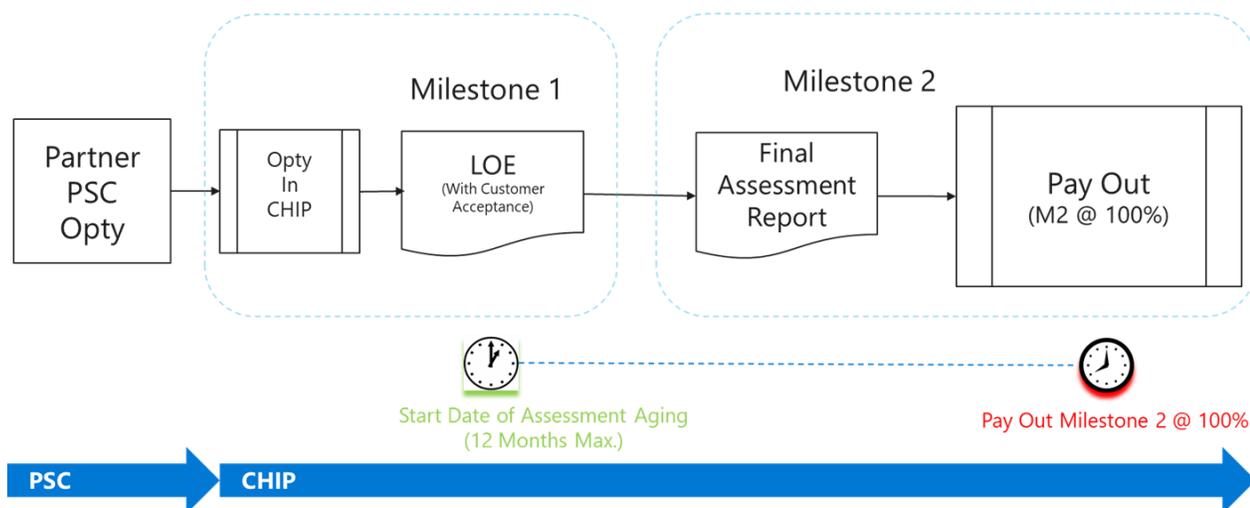
## The FY21 Solution Assessment Program

The FY21 program will be structured on scale and quality. The outcome of all our assessments should be to help our customers transform their business to a cloud-based infrastructure. Solution Assessments Incentives help customers achieve their business transformation through the collaboration of Microsoft and our Solution Assessment Partners.

### Fundamentals of the Solution Assessments Incentives Program:

- Milestone 1 POE will contain the Letter Of Engagement (LOE)
- Milestone 2 POE will contain the Final Assessment Report
- Milestone 1 paid at 0% of the approved incentive level
- Milestone 2 paid out at 100% of the incentive level approved

# FY21 Solution Assessment Partner Incentives Process



- The POE Validation Team will review and approve all POE (Milestone 1 & 2)
- Milestone 2 payout will be open in CHIP for twelve (12) months from validation of Milestone 1.
- Both Milestones should be approved to receive the incentive payment.
- Opportunities where Milestone 1 has been submitted and the opportunity is closed as "lost" will be removed from Milestone 2 opportunity. These situations need to be discussed with your SAS.
- Partners should close their opportunities as Won in PSC at the completion of the assessment delivery to the customer.
- All engagements in CHIP with an Incentive Request Date prior to August 15<sup>th</sup> 2020 will continue to be paid under the FY20 guidance. Review the [Partner FAQ](#) for guidance on the changes in Milestone process.

## Guidance on Incentive Levels

The rates for Solution Assessments are associated with defined incentive levels. These levels are A through E\* in the FY21 Solution Assessment Rate Tables.

The incentive levels are based on the market location where the work is being performed, the segment, and the level of partner professional services resources required to accomplish the scope of work.

The actual amount of time it takes to deliver an engagement will vary based on the complexity of the customer infrastructure, use of third-party ISV tools, scope of work agreed to between the partner and the customer, number of locations, additional elements and variables.

The speed of delivering an engagement will not change the incentive fee associated with the engagement, although opportunities that have been approved for the incentive may have such approval withdrawn if the assessment is not moving toward completion. The partner should make the SAS aware of any challenges during the assessment that could block progress towards completion.

\* The incentive rate table in the US only will include additional incentive levels of F-H.

**The general principles are as follows:**

**Level A:** This level would generally apply to SMB customers where assessments can be operated by partners in remote and emerging markets. The use of Microsoft first party tools for scale campaigns fits this level.

**Level B:** This level applies to assessments for SMC customers that can be operated by partners in remote and emerging markets where partner presence on site is not logistically convenient.

**Level C:** This level will apply to most of the Microsoft corporate managed accounts. These assessments often can be accomplished with a mix of remote partner support and the use of ISV remote tools for scale campaigns to fit this level.

**Level D:** This level allows for the conditions of complexity required in corporate managed accounts and enterprise accounts in emerging markets.

**Level E:** This level should be at the top end of complex assessments where partner specialized resources are required for onsite design and consultation with the customers. This level is also generally seen in developed markets for larger enterprise managed accounts.

The selection of which incentive level to be assigned is the choice of the SAS within the area where the customer exists. Each partner should work directly with their SAS to discuss their specific region applications. The incentive rates may be adjusted at Microsoft's discretion upon 30 days' notice (e.g. to adjust for significant changes in currency exchange rates).

For a complete list of rate schedules by country and assessment type, please see the Solution Assessment Incentive Rate Table under the resources section on the [Solution Assessment Partner Portal](#).

## Conditions of Payment

The Proof of Execution (POE) Validation Team will provide final validation on all POE for payment. This will require quality, accuracy and completeness in all POE submitted. Incomplete or alternative documentation will be rejected by the team and delay or possibly cancel your incentive payment.

The following set of requirements must be fulfilled to receive incentive payout on Solution Assessments:

- Assessment opportunities must be created by the SAS or submitted by the partner through Partner Sales Center.
- All assessments opportunities must be created with a Solution Assessment incentive type.
- The SAS must review the opportunity and if approved, assign the appropriate incentive level to the opportunity, and mark the incentive "approved". (No opportunity will flow to CHIP without the SAS review and incentive approval)
- On completion of the assessment, and presentation of the final Assessment report to the customer the partner must close the opportunity as "Won", and then must submit the following.

- **POE for Milestone 1:**

**Letter of Engagement:**

- The company name
- The customer contact name who will be providing approval for the execution of the Solution Assessment
- The assessment type that will be delivered
- Timelines, such as start and completion date
- Clear acceptance from the customer of the assessment (customer signature, electronic, email clearly stating acceptance)

- **POE for Milestone 2:**

- **Final Solution Assessment Report:**

- The company's name
    - The customer contact name who provided acceptance
    - A final assessment report unique to this customer opportunity and aligned to the assessment type agreed upon in the LOE and approved in Partner Sales Connect
    - The final assessment report must contain the minimum deliverables as prescribed in the relevant assessment SOW.

### 1.3 Statement of Work (SOW)

The specific requirements for incentive payment vary by Solution Assessment engagement type, and those requirements are defined in the statement of work (SOW) document for each engagement type. Partners are required to follow and fully complete the requirements outlined in the Solution Assessment Incentive SOW to earn payment of the associated incentive.

If a customer **does not** consent to disclose the information needed for the partner to prepare and deliver the requirements outlined in the SOW, that assessment is **not** eligible for this incentive.

#### SOW outline:

- **Assessment Overview:** Contains the description and objective of the specific assessment.
- **Letter of Engagement:** Provides the partner requirements related to customer agreement.
- **Data Collection:** Provides engagement data collection input requirements and a minimum list of required steps the partners must take to ensure satisfactory levels of completeness and accuracy to build the basis for the required analysis and customer deliverables.
- **Analysis:** Based on the inputs and data collection, this section provides partner requirements related to engagement analysis and review.
- **Deliverables:** Provides the summary recommendations derived from the analysis of the data collected that provides the customer with a specific set of actionable recommendations and specific migration steps and a migration timeline.

### 1.4 Guidance on multiple assessments within a fiscal year

- Customers are eligible to receive multiple assessments within a fiscal year (from July 1-June 30) under these conditions:
  - A unique PSC assessment opportunity needs to be created
  - The assessments need to address different customer problems and provide unique recommendations and migration plans
  - All details of each SOW's need to be uniquely fulfilled
  - Each assessment must be reviewed and approved by the SAS
  - The assessments need to align with Microsoft's Solution Assessment strategy

- Customer and partner co-funding needs to be discussed along with additional investment from Microsoft on more than one assessment for one customer

## **1.5 Public Sector Customers**

Many countries in the world have restrictions in place so that Partners may not earn incentives for transactions involving public sector customers. Check with your local SAS for questions about local regulations.

## 2 Partner Participation

Microsoft sets criteria requirements for all partners requesting participation in the Solution Assessment Incentive Program. These criteria are written to reflect the engagement delivery requirements and customer value expectations and are consistent across all geographies and for all partners.

### 2.1 Eligibility and Participation Criteria

Partners with active and enrolled status in the Solution Assessment Incentive Program in FY20 will continue to be eligible for incentives in FY21 if they have an active MPN membership and an active Silver or Gold MPN Competency. Partner qualifications will be reviewed for eligibility annually. If established partners do not accomplish eligibility and participation requirements in the current year, they will be removed in the next annual review. All new partners are onboarded through the local SAS in their area. The SAS will identify the partners to be onboarded based on the matching of skills and expertise in the partner company and the business needs of the subsidiaries supported by the SAS.

Prior to starting the onboarding process, partners will need to discuss with the SAS the capabilities their company has in supporting assessments in their localities.

Partners currently not enrolled in the Incentive Program must meet the below FY21 incentive criteria to be eligible for Solution Assessment Incentive onboarding.

#	Eligibility Requirements	Specific Criteria
1	Active MPN membership	Partners need to maintain an active MPN membership to be eligible for Solution Assessment incentives
2	One Microsoft Silver or Gold MPN competency	Partner Competency Status = (Active-Earned, Active Pre-Approved) <ul style="list-style-type: none"><li>• More Info: <a href="#">MPN Competency Status</a></li><li>• Partners can inherit competency status from HQ location</li></ul>
3	Azure Expert MSP/ Advanced Specialty Partner	Starting on April 15 <sup>th</sup> 2021 the Azure Solution Assessments (Data & Infrastructure Migration, Application Modernization, Azure Foundations, Azure Express, Azure Cost Optimization) will require an <a href="#">Azure Expert MSP/ Advanced Specialty</a> Partner certification.
#	Participation Requirements	Specific Criteria
1	Incentive Activity	Partners need to actively participate in the Solution Assessment Incentive Program in the current fiscal year to remain eligible to earn Solution Assessment incentives in the following fiscal year. This equates to at least one approved Solution Assessment incentive deal.

### 2.2 Onboarding & Account Setup

For a partner to become a Solution Assessment Incentive eligible partner, they must have the following requirements completed.

- An active MPN ID for the location they will be performing the engagement
- Must have completed the required Gold or Silver Microsoft MPN competency

Microsoft provides a bi-monthly onboarding cycle (1<sup>st</sup>, 15<sup>th</sup>) of each month to add partners to the incentive program.

On successful registration you will be asked to set up an account for the following Microsoft systems.

## 1. Connect

- Activation of the Solution Assessment incentive feature in PSC occurs only after the partner completes enrollment into the program through your local SAS

## 2. Channel Incentives Platform (CHIP)

- Enrollment in the CHIP is required for participation in the incentive program. The partner will receive an email with an invitation to register their profile in CHIP, including setting up a banking and tax profile.

*Note: the invitation is sent from the alias: [microsoft@e-mail.microsoft.com](mailto:microsoft@e-mail.microsoft.com) and often times is found in the email "Junk/Spam" folder*

## 2.3 Loss of Eligibility & Termination

In the event the partner breaches any terms of the MPN agreement, Microsoft may deny, suspend, or terminate partner from the incentive. In addition, Microsoft may cancel or withhold incentive payments. Written notice will be provided to the partner prior to any decision to cancel or withhold payment.

Partners who no longer meet eligibility or participation criteria during the eligibility review become "not eligible" to earn incentives, and will be paid as follows:

#	Incentive Type	Treatment
1	Incentive Request	Validated incentive requests prior to loss of eligibility will remain active for the life of the incentive request. Partner ability to create new incentive requests will be removed from Partner Sales Connect upon loss of eligibility. If incentive requests were made after the loss of eligibility, those incentive requests will be declined by Microsoft.

## 2.4 Description of Solution Assessment Incentive Opportunity process

The SAS will review submitted opportunities registered for incentives and approve or reject the opportunity based on customer need and business strategy alignment. If rejected, the SAS will communicate to the partner. A partner should always work directly with the SAS on potential opportunities before committing to the customer about any Microsoft investment funds for an assessment.

If the SAS approves the opportunity, the opportunity moves to the next step: approval. The approval process is as follows:

1. Solution Assessment incentive request via PSC (Partner) or MSX (Microsoft). Partner should communicate with SAS prior to committing to an assessment with a customer.
2. Opportunity validation, incentive approval, and engagement level assignment in MSX (Microsoft). Once the opportunity is approved, the partner may engage with the customer.
3. Delivery and approval of Letter of Engagement (LOE) (Partner/customer)
4. Upload LOE as Milestone 1 POE in CHIP (Partner)
5. Execute and deliver assessment (Partner/Microsoft)
6. Upload Final Assessment Report as Milestone 2 POE in CHIP (Partner)
7. Validate POE (POE Validation Team)

- Errors found in POE will be posted by the POE Team in the Partners **Comments** field of the relevant engagement in the CHIP platform
8. On validation of all POE, the opportunity will progress to the payment processing stage
  9. Incentive payment issued (Microsoft)

## 2.5 Solution Assessment SAS assigns the Incentive Rate Level

If the SAS determines that an incentive request is to be approved, they will assign the incentive rate level before approving the request. The incentive level is based on the customer location, complexity of the opportunity, and whether the assessment will be conducted remotely or on site by the partner. You can find the Incentive Rate table located on the [Solution Assessment MPN Portal](#).

### **IMPORTANT: Rate determination when engagements cross fiscal years**

When the opportunity is approved, and submitted into CHIP, the current fiscal year rate will be locked in from that date. This date is reflected as the Incentive Request Date in CHIP. When a partner delivers a Solution Assessment that crosses over into the next Microsoft fiscal year, the incentive rate applied will be the rate at the time the incentive request was approved and submitted into CHIP.

## 2.6 Assessment Opportunity Management and Pipeline Hygiene

When you accept Microsoft funding for an assessment you are required to keep the SAS informed regularly of the engagement progress, raising any concerns or issues to their attention. The partner is required to manage the opportunity in accordance with standard pipeline management practices. This may include:

- Confirmation that the customer has received the LOE and wants to proceed
- Periodic updates on PSC of project delivery to ensure it continues to move forward toward the planned completion date established in the LOE.
- Review of all required POE deliverables with the SAS for quality and completeness.
- Validation that the Final Assessment report presentation has been delivered and all required POE deliverables have been received by the customer.

In some cases, if an assessment misses milestones from the LOE, or fails to make timely progress toward the agreed to completion date due to issues with the partner, the incentive approval may be withdrawn. Prior to doing so, the SAS will discuss any concerns with the partner to see if there is an opportunity for the partner to continue the required work to complete the assessment.

**Note: If incentive approval is withdrawn, the partner will not be eligible for any compensation toward the partial engagement.**

## 2.7 POE Review

Upon successful completion of milestone 1 and 2 during the assessment, the partner will provide the required POE in the SOW deliverables by uploading them to CHIP.

Prior to submission in CHIP, the SAS may review the LOE and the final assessment report for quality and completeness. This review may include discussions with the customer or other Microsoft account team members as deemed appropriate.

POE validation will be performed by the POE Validation Team against the partner provided POE materials following submission to CHIP by the partner. POE submitted to Milestone 1 and Milestone 2 will be reviewed within 10 business days. Additional information, or clarification may be requested as part of the POE validation review process for submitted POE (for example, clear customer acceptance in the LOE). These requests will be communicated via the Comments field in CHIP for the engagement in question.

Partners that show systemic failure on POE performance may result in a suspension of the partner's participation in the program.

Required POE per Assessment Type:

Solution Assessment Type	LOE**	Final Assessment Report***
Data and Infrastructure Migration	✓	✓
Application Modernization	✓	✓
Azure Foundations	✓	✓
Azure Cost Optimization*	✓	✓
Azure Express	✓	✓
Workplace Modernization	✓	✓
Cybersecurity	✓	✓
Teams Assessment	✓	✓
Contract Optimization*	✓	✓
<ul style="list-style-type: none"> <li>* Migration Plan is optional for Contract Optimization and Azure Cost Optimization as POE</li> <li>**LOE may allow for Customer Acceptance to be an email from the customer acknowledging the acceptance of the Solution Assessment</li> <li>***Final Assessment = Completion of Solution Assessment Report</li> </ul>		

## 3 Calculation & Payment

### 3.1 Payment Calculation

Using the defined fee schedules, the associated incentive fee will be calculated and processed, with payments being issued monthly.

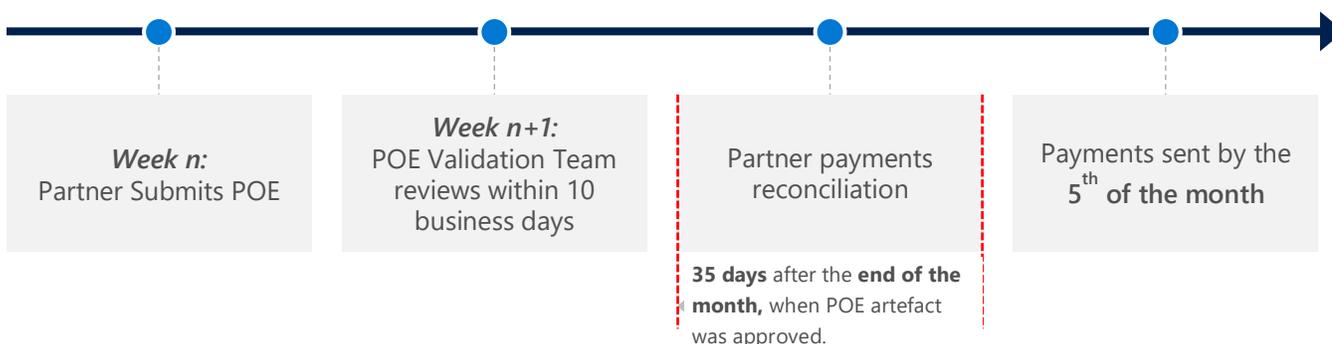
Opportunities must have all the following attributes to appear in this payment approval report:

1. Approved Solution Assessment Incentive.
2. Solution Assessment Engagement Level local attribute.
3. "Opportunity Payment Certification" checkbox must be checked and submitted by POE Validation Team in CHIP.

Rate level is set for the engagement at the time the incentive request is approved in MSX.

### 3.2 Timing & Cadence

Payment will be made by Microsoft within 35 business days from the end of the month following POE Validation Team review and approval of Milestone 1 and Milestone 2. **Example:** Payment request created in March, will be executed by Microsoft on 5<sup>th</sup> May.



Depending on the countries and banks involved, the partner's bank may take an additional 5 – 20 days to reflect the disbursement in the partner's bank account.

**Important note regarding taxes** - The incentive that the partner receives includes any applicable goods and services tax, value added tax, sales tax, gross receipts tax, or any other tax that is applicable as a result of the services that the partner provides. It is solely the partner's responsibility to pay all applicable taxes related to the incentives it receives.

To comply with local regulatory requirements for some countries when applicable, Microsoft will hold incentive payments until a partner submits a tax invoice to Microsoft, which acts as an incentive claim. In such instances, partners are notified of invoice requirements at the time when the incentive payment is ready for disbursement.

For partners that have missing portions of the required payment documentation, such as tax form, bank detail and/or invoice, Microsoft will continue attempting to make payment in the upcoming pay cycles in the next 180 days after the initial payment run. After 180 days of the original expected payout date, if Microsoft still does not have the required payment documentation to process the payment, the incentive payment will be forfeited, subject to the laws in the partner's country, and no further notification will be sent to the partner.

Unless provided otherwise, the amounts Microsoft shall pay to partners are inclusive of all taxes.

## 4 Support & Escalation

### 4.1 Solution Assessment Partner Portal

Information on the program, engagement types and supporting program documentation can be found on the MPN Partner site listed [here](#).

### 4.2 Microsoft Contact

Primary support for the program (e.g. program information, engagement management, incentive request approvals etc.) is provided by your local SAS.

### 4.3 Payment Questions

Support can be accessed through [Microsoft Partner Network](#). When the portal opens, select 'Incentives' as your Category or search your program name in the "Browse Topics" area.

After viewing the available topic-specific help, if you still need assistance, you can create a ticket right from Recommended Documents – **Create a support ticket** option.

Support is also available for eligible partners through the Call Logging Tool which can be accessed via [Explore.ms](#)

### 4.4 Overpayment

Overpayment may occur due to various reasons: calculation error, payment processing error, incorrect engagement type/level, POE not validated appropriately etc. In the event of an overpayment, Microsoft will proceed with the recovery of an overpayment in accordance with the MCI A.

Microsoft will generally attempt to recover overpayment by offsetting against future incentive payments earned. If for any reason such approach cannot be executed (e.g. partner is no longer participating in an incentive), Microsoft reserves the right to invoice partner for the overpaid amount directly.

Alternative recovery options:

- Partner may be offered an option to repay the overpaid amount directly to Microsoft. Such option can be offered by the SAS if it is a partner preference to return the overpayment versus seeing adjustment to future earnings. The default recovery approach is an adjustment to future earnings.
- Following receipt of a request from the partner, Microsoft may agree to spread out recovery of the overpayment over several earning periods but not exceeding 180 days in total.

### 4.5 Partner Escalation Paths for all Programs

To ensure the best experience to our partners on any partner incentives queries and escalations, we would like to remind you of the paths that need to be followed. Please familiarize yourself with these official escalation paths before raising any query.

Support can be accessed through [Microsoft Partner Network](#). When the portal opens, select 'Incentives' as your Category or search your program name in the "Browse Topics" area.

After viewing the available topic-specific help, if you still need assistance, you can create a ticket right from **Recommended Documents – Create a support ticket** option.

Support is also available for eligible partners through the [Call Logging Tool](#) which can be accessed via [Explore.ms](#)

Support requests will no longer be accepted through direct email as this function is being retired. Please begin using the new support experience via [Microsoft Partner Network](#).

## 5 Appendix: Resources

The links within the appendices of this guide will assist you with the required systems, engagement deliverables and pricing structure for the Solution Assessment Incentive Program.

Title	Content	URL
<b>Solution Assessment Overview</b>	External website covering Solution Assessment basics. High focus on customer value proposition.	<a href="#">Solution Assessment External site</a>
<b>Solution Assessment Partner Portal &amp; Resources</b>	Partner facing MPN site providing Solution Assessment Incentive Support Documentation: <ul style="list-style-type: none"> <li>• Incentive Program Guide</li> <li>• Engagement Levels &amp; Incentive Rates</li> <li>• Incentive Engagement Types &amp; SOW's</li> <li>• Partner Templates and additional resources</li> </ul>	<a href="#">Solution Assessment MPN site</a>
<b>Partner Sales Connect (PSC)</b>	Partner facing CRM tool for registering Solution Assessment Engagement opportunities	<a href="#">Partner Sales Connect</a>
<b>Partner Sales Connect Resources</b>	Connect resources and guidance for Solution Assessment Partners	<a href="#">Learn to Use Partner Sales Connect</a> <a href="#">Getting Started with Microsoft Partner Sales Connect (video)</a> <a href="#">Accessing Partner Sales Connect for the First Time</a>
<b>CHIP – Channel Incentives Platform</b>	Partner facing tool to upload engagement POE and review payment status for approved opportunities	<a href="#">CHIP</a>
<b>CHIP – Channel Incentives Platform Resources</b>	<a href="#">CHIP Guides &amp; Process</a> <ol style="list-style-type: none"> <li>1. Partner Profile Setup: Bank and Tax Setup Details</li> </ol>	<a href="#">CHIP Guides &amp; Process</a>