



Online Certification Portfolio

Welcome to the Online Certification Portfolio system. This document will provide you with an overview of how to navigate the site, submit your Continuing Professional Education Credits (CPEs), and pay your annual maintenance fees. For further information please contact Certification@icba.org.

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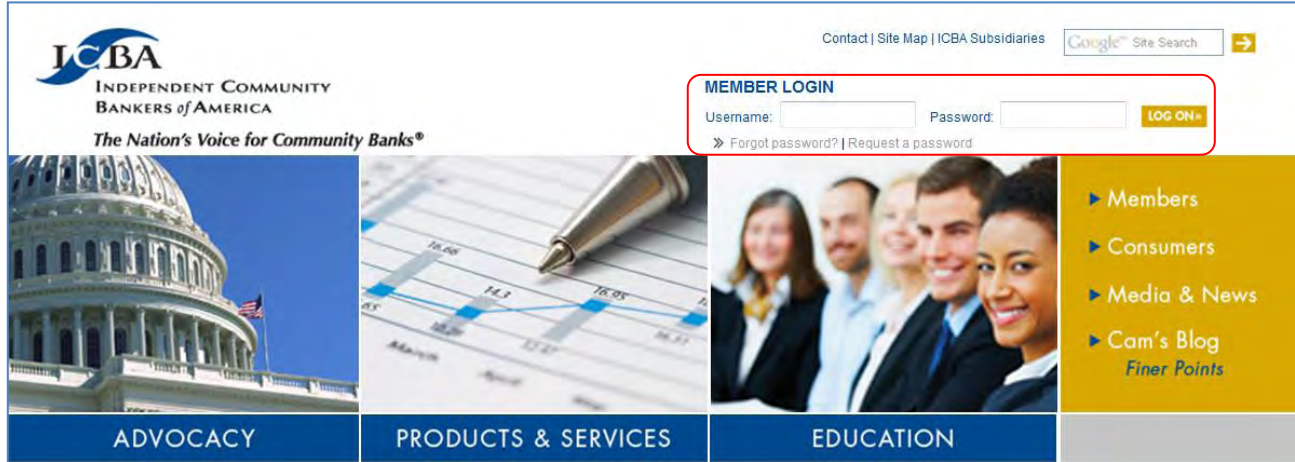
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Accessing the Online Certification Portfolio system

- Navigate to ICBA.org and enter your username and password:



- If you have forgotten your password or need to request access to ICBA.org please click on the appropriate link below the login area.
- From the Education menu select Certification



Click the [View My Certification Portfolio >](#) button to access the Online Certification Portfolio:



- Providing you have already logged into ICBA.org you will be taken directly to ICBA's Online Certification Portfolio system where you can manage your ICBA Certifications. If you have not already logged in you will be taken to a login screen where you must enter your ICBA Username and Password:

Sign In

Username

Password

Resources

- In order to help facilitate the transition to this new service we have included some reference links at the bottom of the screen:

[Help](#) | [Policy](#) | [Contact Us](#)

- Help – this link will provide you with a step by step guide on how to use the service
- Policy – provides details on the terms and conditions of ICBA certifications

- Contact Us – provides phone and email contact information if you require additional support or if you have questions

Maintaining Your Designations

- Upon accessing the Online Certification Portfolio you will see the home screen which provides the following details:
 - A welcome message
 - A link for payment of annual maintenance fees online
 - A list of your current designation(s)
 - Your cycle end date
 - Current number of CPE credits completed
 - Number of CPE credits required to maintain the designation
 - A button to report additional CPE credits
 - A button to obtain your current certification certificate


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Welcome Message

- The welcome message is used to communicate news, updates and general information regarding certifications. If applicable, this area will provide details on pending fees that are due for your designation(s). You can click the link to be taken to the online payment screen:

My Certification Portfolio



Hello James Howe Sign Out

You can renew your annual file maintenance fee for "Certified Community Bank Internal Auditor (CCBIA)" by clicking this [link](#).

Certification Designation(s)	Cycle End Date	Current Number of CPE Credits Completed	Number of CPE Credits Required	Report CPE Credits / Comment(s)	Current Status Certificate
Certified Community Bank Internal Auditor (CCBIA)	12/31/2009	32.00	30.00	Declined	Not Available
Certified BSA/AML Professional (CBAP)	12/31/2009	11.50	15.00	Declined	Not Available
Certified Community Bank Compliance Officer (CCBCO)	12/31/2010	0.00	30.00	<input type="button" value="Report"/>	<input type="button" value="Certificate"/>

CPE Credits

- In order to view the details of your CPE submissions for a specific designation or to report additional items for consideration click the button to access the reporting form. Please note that you can only report CPE credits for designations that are in good standing (i.e. have been kept current on both payment of fees as well as achieving the minimum number of CPE credits by the cycle end date)

My Certification Portfolio



Hello James Howe Sign Out

You can renew your file maintenance fee for "Certified Community Bank Compliance Officer (CCBCO)" by clicking this [link](#).

Certification Designation(s)	Cycle End Date	Current Number of CPE Credits Completed	Number of CPE Credits Required	Report CPE Credits / Comment(s)	Current Status Certificate
Certified Community Bank Compliance Officer (CCBCO)	12/31/2010	58.00	30.00	<input type="button" value="Report"/>	<input type="button" value="Certificate"/>

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- On the reporting form you will see a list of all pending, approved and declined CPE submissions that relate to this cycle period:

Percentage of CPE credits from live training: 92.31%

Pending

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)	Edit
<input type="button" value="Back"/> <input type="button" value="Add more rows"/>							

Approved

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)
ICBA Seminar	Auditing the Bank's Trust Department	Seminar	10/15/2010	12.00	[View]	
ICBA Education Online Training	Online: Ethics for Bankers	ICBA Education Online Training	11/16/2010	1.00		

Declined

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)
ICBA Education Video Tapes	Bank Director Training: Roles and Responsibilities	ICBA Education Video Tapes	11/16/2010	1.00		

- Also included on the Reporting Form is a notification box that calculates the percentage of CPE credits that come from live, in person classroom training:

Percentage of CPE credits from live training: 92.31%

Pending

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)	Edit
<input type="button" value="Back"/> <input type="button" value="Add more rows"/>							

Reminder: a minimum of 50% of all CPE credits must come from live, in person classroom training provided by ICBA or other non-ICBA/third party providers.

- To submit additional CPE credits for considerations, click the **Add more rows** button:

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)	Edit
<input type="button" value="Back"/>	<input type="button" value="Add more rows"/>						

- This will bring up the Add CPE credit form:

Add CPE credit form

[Home]

Course Type

Course Title

Course Description

Date Completed (M/d/yyyy)

CPE Credits

Comment

- On the CPE credit form select the type of course that you are submitting using the drop down menu:

- Non-ICBA In-Person Classroom Seminar
- Non-ICBA - Other (online, audio, webinar, etc.)
- ICBA Education Audio Conf: CD w/Handouts or WAV Files
- ICBA Education Online Training
- ICBA Education Video Tapes
- ICBA Live In-Person Classroom Seminar

- For Non-ICBA courses you will be required to provide the following course details in the corresponding text fields:
 - Title
 - Description
 - Date of completion
 - Number of CPE credits based on the formula of 1 CPE credit per 50 minutes of training
 - Comment (optional)
- For all ICBA related courses you will use the Course title drop down to select the relevant training. The description and CPE credit fields will automatically be populated for you so the only fields that you need to complete are the date of completion and comment.
- Once you have completed the form click . The CPE submission will then appear in the pending section of the Reporting Form screen. Now you will be able to provide the appropriate supporting documentation.

Supporting Documentation

- If you have been notified that your certification is being audited by ICBA, you will need to provide supporting documentation. You can upload the information to your portfolio by following the steps below or you can mail the information to:

ICBA Education
Attn: Julie Woida
518 Lincoln Road
Sauk Centre, MN 56378.

- In order to validate the CPE submission it is important that you provide supporting documentation such as a certificate of completion, a receipt of purchase, or a registration form and course agenda.
- From the Reporting Form screen click on the button:

Pending

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)	Edit
ICBA Education Online Training	Online: Telepro Online - Complete Program	ICBA Education Online Training	11/25/2010	1.00	<input type="button" value="Upload"/>		

- From the Upload Form you will click the button and locate the electronic copy of the support document that you wish to include:

- Once you have located the appropriate PDF, JPG or GIF file click the button.
- If the document is successfully uploaded you will see the following message appear:

Note – uploading any additional files will overwrite the previous upload.

- Click the Back button to return to the Reporting Form screen.
- To see the file that was uploaded click the [View](#) link beneath the upload button.

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Pending

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)	Edit
ICBA Education Online Training	Online: Telepro Online - Complete Program	ICBA Education Online Training	11/25/2010	1.00	Upload [View]		

- If you are not able to provide an electronic copy of attendance or purchase or completion, please keep a hard copy in the event that your certification file is audited by ICBA.

Editing or Deleting a Submission

While a submission is still in the "pending" stage it can be edited or deleted. In order to edit the submission click the  icon on the corresponding row and make the desired changes on the CPE Credit Form. To delete the row click on the **X** of the appropriate submission.

Pending

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)	Edit
ICBA Education Online Training	Online: Telepro Online - Complete Program	ICBA Education Online Training	11/25/2010	1.00	<input type="button" value="Upload"/> [View]		 

Submission Comments from the ICBA Administrator

- The ICBA Administrator will review the CPE submissions and during that time they may choose to add a comment regarding your submission. If you see the [\[Read\]](#) link under the Comment column it means there is a comment for you to see. If the link is not present that means the Administrator did not add a comment.

Pending

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)	Edit
ICBA Education Online Training	Online: Telepro Online - Complete Program	ICBA Education Online Training	11/25/2010	1.00	<input type="button" value="Upload"/> [View]	[Read]	 

Current Status Certificates

- With the launch of the Online Certification Portfolio the ICBA Education department will no longer be sending out the current status certificates because they can now be downloaded or printed from within the system.
- For all current certification designations you can obtain the certificate by clicking the button on the appropriate row:

Certification Designation(s)	Cycle End Date	Current Number of CPE Credits Completed	Number of CPE Credits Required	Report CPE Credits / Comment(s)	Current Status Certificate
Certified Community Bank Compliance Officer (CCBCO)	12/31/2010	58.00	30.00	<input type="button" value="Report"/>	<input type="button" value="Certificate"/>

- This will bring up the certificate in a PDF format. If you want to convert the certificate to another format use the option buttons at the top of the page:



Certification Definitions

Current Status Certificate – A certificate that the certified person can print at the end of each maintenance cycle provided they have met the certification requirements. The certificate provides proof of continued certification in their program.

Certification – The term Certification applies to individuals and is granted by an association or other non-government organization to individuals who meet predetermined qualifications established by the association the organization. A certification program uses a board of professionals to review instructional materials and applies a testing instrument to measure each individual's level of competence after completing each course.

Continuing Professional Education (CPE) - credit earned through course work. Qualified training is equal to 1 CPE credit per every 50 minutes of instruction.

File Maintenance Fee – The annual fee billed by ICBA for maintaining your certification records.

Live Training – In person, on-site, instructor led classroom training.

Maintenance Cycle – The two year time period that you are assigned after you initial certification in which you must meet certain criteria to remain certified. This Maintenance Cycle begins on January 1 of the year following initial certification. The duration of the Maintenance Cycle is two calendar years. You will be moved into a new Maintenance Cycle at the end of your current cycle provided that you have met the certification maintenance requirements. This process is on-going, every two years for as long as you want to maintain your certification.

Other Training - Audio Conferences/Webinars, Computer Based Training, Internet/Online Courses, Videos, DVD's and all other Self Study courses