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.

Table of Contents:

Accessing the Online Certification Portfolio system ................................................................. 3
Maintaining Your Designations ........................................................................................................ 4
  Welcome Message .......................................................................................................................... 5
  CPE Credits .................................................................................................................................. 5
  Supporting Documentation ............................................................................................................. 8
  Editing or Deleting a Submission ..................................................................................................... 10
  Submission Comments from the ICBA Administrator ................................................................... 10
Current Status Certificates .............................................................................................................. 11
Certification Forum ........................................................................................................................... 12
Resources ........................................................................................................................................ 12
Certification Definitions .................................................................................................................... 13
Accessing the Online Certification Portfolio system

- Navigate to ICBA.org, click on Member Login 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.

- Once you are logged in, click on the My Account button.

- The My Account Links box will open. In the My Account Links box select the My Certification Portfolio button.
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 Start Date and 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
  - A button to access the Certification Forum where you can join in discussion with your certified peers.
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:

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)
Online Certification Portfolio

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

<table>
<thead>
<tr>
<th>Course Type</th>
<th>Course Title</th>
<th>Course Description</th>
<th>Document Completion</th>
<th>CPE Credits</th>
<th>Documentation (upload a certificate or receipt)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>ICBA Education Online Training Online Bank Secrecy Act - Overview for All Personnel - 12/31/2018</td>
<td>ICBA Education Online Training</td>
<td>12/31/2018</td>
<td>1.00</td>
<td>UPLOAD</td>
<td></td>
</tr>
<tr>
<td>Pending</td>
<td>ICBA Education Online Training Online Wage &amp; Hour - 12/31/2018</td>
<td>ICBA Education Online Training</td>
<td>12/31/2018</td>
<td>1.00</td>
<td>UPLOAD</td>
<td></td>
</tr>
<tr>
<td>Pending</td>
<td>ICBA Education Online Training Online Life Cycle of a Leaves of Absence: Medical - 12/31/2018</td>
<td>ICBA Education Online Training</td>
<td>12/31/2018</td>
<td>1.00</td>
<td>UPLOAD</td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td>ICBA Education Online Training Online Americans With Disabilities Act Training for Frontline Staff - 12/31/2018</td>
<td>ICBA Education Online Training</td>
<td>12/31/2018</td>
<td>0.50</td>
<td>UPLOAD</td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td>ICBA Education Online Training Online Auditing: The Basics Individual - 12/31/2018</td>
<td>ICBA Education Online Training</td>
<td>12/31/2018</td>
<td>2.00</td>
<td>UPLOAD</td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td>ICBA Live In-person Seminar Seminar: Annual Current Issues/Certification Conference (SAEAC2018) - 10/25/2018</td>
<td>ICBA Live In-person Seminar</td>
<td>10/25/2018</td>
<td>8.00</td>
<td>UPLOAD</td>
<td></td>
</tr>
<tr>
<td>Declined</td>
<td>ICBA Education Online Training Online: Regulation Z: Truth in Lending - 12/31/2018</td>
<td>ICBA Education Online Training</td>
<td>12/31/2018</td>
<td>1.00</td>
<td>UPLOAD</td>
<td></td>
</tr>
</tbody>
</table>

- 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:

**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.**
Online Certification Portfolio

- To submit additional CPE credits for considerations, click the button:

  ![](image)

  This will bring up the Add CPE credit form:

  ![Add CPE credit form]

  - On the CPE credit form select the type of course that you are submitting using the drop-down menu:
For Non-ICBA courses you will be required to provide the following course details in the corresponding text fields:
- Course Provider
- 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 SUBMIT. 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

In order to validate the CPE submission, you are required to 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 UPLOAD button:
From the Upload Form you will click the Choose File 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 Upload button.
- If the document is successfully uploaded, you will see the following message appear:

**Document uploaded successfully**

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.
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.

<table>
<thead>
<tr>
<th>Course Type</th>
<th>Course Title</th>
<th>Course Description</th>
<th>Document Completion</th>
<th>CPE Credits</th>
<th>Documentation (upload a certificate or receipt)</th>
<th>Comment(s)</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICBA Education Online Training</td>
<td>Online Bank Secrecy Act - BSA and Compliance Officers - ICBA Education Online Training</td>
<td>12/31/2019</td>
<td>1.00</td>
<td>UPLOAD (View)</td>
<td>![Read]</td>
<td>![Edit]</td>
<td></td>
</tr>
</tbody>
</table>

**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.
Current Status Certificates

- Community Banker University does not send current status certificates. You are able to download or print them from within the certification portfolio.
- For all current certification designations, you can obtain the certificate by clicking the **CERTIFICATE** button on the appropriate row:

<table>
<thead>
<tr>
<th>Certification Designation(s)</th>
<th>Cycle Start Date</th>
<th>Cycle End Date</th>
<th>Number of CPE Credits Required</th>
<th>Current Number of CPE Credits Completed</th>
<th>Report CPE Credits / Comment(s)</th>
<th>Current Status Certificate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certified Community Bank Compliance Officer</td>
<td>1/1/2018</td>
<td>12/31/2019</td>
<td>30.00</td>
<td>13.50</td>
<td>REPORT</td>
<td>[CERTIFICATE]</td>
</tr>
</tbody>
</table>

- 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 Forum

Access Community Banker University’s Certification Forum. The forum is an online discussion site where certified bankers can hold conversations in the form of posted messages. Each certification type has its own forum. To access your discussion forum, click on the red CLICK HERE button on the home page of your certification portfolio.

Resources

- In order to help you we have included some reference links at the bottom of the screen:
  - 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 question
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