



Organization Profile Guide: ICBA Bancard Plan Manager Update

ICBA’s online resources are accessible by logging onto ICBA’s website www.icba.org. Individuals can manage their own profile, and C-level or middle manager employees can edit the organization’s profile and manage associated employee profiles. This guide was developed to assist ICBA Bancard client banks to edit and maintain their organization’s credit and debit program contacts, known as Bancard Credit Plan Managers or Bancard Debit Plan Managers in our job function menu.

Please use this information to help you add, edit, or remove Bancard Plan Managers as needed, to ensure the correct employees have access to the clients-only area of ICBA Bancard’s website, and are receiving all important notices related to your program. These include but are not limited to timely and actionable contract notices, Bancard client benefit information, and other exclusive marketing and education opportunities.

If you have any questions regarding your ICBA Bancard program or this Plan Manager update, please contact the ICBA Bancard Client Relations team at (800) 242-4770 or Bancard@icba.org.

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What is an ICBA Bancard Plan Manager Job Function?

ICBA Bancard Plan Managers are different types of **job functions** within the ICBA.org roster system. They flag the contacts at your bank responsible for your credit and/or debit program with ICBA Bancard. Job functions are separate from job titles.

The **ICBA Bancard Plan Manager Definitions** below will help you select the correct job functions for your employees. Only add a Bancard Plan Manager for the program you have with Bancard. If you only partner with us for credit card issuing, you only need to add/update the **Bancard Credit Plan Manager** job functions in your roster. If you only have a debit program with us, you will only add/update **Bancard Debit Plan Manager** job functions in your roster.

Bancard Plan Manager Job Function Definitions

Use these definitions to help you assign the correct job function to your employee profiles.

Bancard Primary Plan Manager

- Is the main contact at the bank for your credit or debit program
- Receives action-required notices and timely operations updates when applicable (i.e., contract updates, network (Visa/Mastercard) announcements and operation updates, opt-in/out service promotions)
- Has ongoing access to update all employees within the bank's roster via ICBA.org
- Has access to the ICBA Bancard (icba.org/bancard) restricted areas of the site, including the ACE complimentary portfolio analysis tool (*FIS credit banks only*)
- Receives the weekly Payments News & Notes e-newsletter curated by ICBA Bancard
- Receives the quarterly thought leadership publication Bancard Confidential

Please limit Primary Plan Managers to one (1) staff member per product (credit/debit)

Options available in the Job Function menu:

Bancard Primary Credit Plan Manager

Bancard Primary Debit Plan Manager

Bancard "additional" (non-Primary) Plan Manager

- Has access to the ICBA Bancard (icba.org/bancard) restricted areas of the site, including the ACE complimentary portfolio analysis tool (*FIS credit banks only*)
- Receives the weekly Payments News & Notes e-newsletter curated by ICBA Bancard
- Receives the quarterly thought leadership publication Bancard Confidential

Please limit "additional" (non-Primary) Plan Managers to no more than five (5) staff members per product (credit/debit)

Options available in the Job Function menu:

- Bancard Credit Plan Manager**
- Bancard Debit Plan Manager**

Bancard Fraud Contact

- Receives updates and notices pertaining to the ICBA Bancard Fraud Loss Protection Plan, or “FLPP”.
 - If your bank is not enrolled in FLPP, you do not need to add a Bancard Fraud Contact
 - This contact receives operational and/or marketing notices only. Assigning a Bancard Fraud Contact does not provide access to the fraud claims portal. A separate registration is required for FLPP claims portal access.

Options available in the Job Function menu:

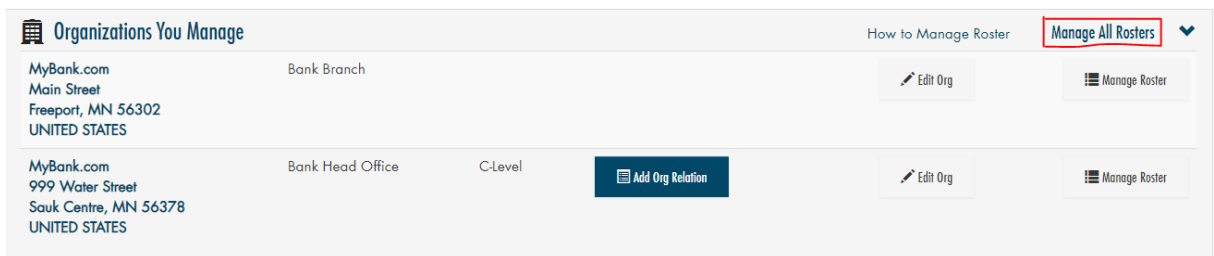
- Bancard Credit Plan Manager**
- Bancard Debit Plan Manager**

Identify Existing Bancard Plan Managers in Your Roster

Review your organization’s current employee roster to identify which, if any, employees are flagged as Bancard Plan Managers. This will help you determine which employees should have this job function removed, and which employees are missing this designator.

To identify which employees in your roster currently have Bancard job functions:

1. Visit www.icba.org and login on the upper right corner using your email and password.
2. Click on **My Account** in the upper right corner.
3. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters**.



4. From this screen you can filter and sort the report in several ways to find the employee you want to edit or simply click to each page until you find the individual (listed by last name in alphabetical order). You can choose from any of the dropdowns at the top of the screen and click **Filter** or you can click on any of the table column headers to sort.

Organization:
 Relation type:
 City:
 State:
Filter

All contact info added to roster will be primary. If any additional contact info needs to be updated, please click the "Manage all contact info" next to the specific individual you want to review.

Organization Roster										+ Add Individual
	Prefix	First Name	Last Name	Suffix	Nickname	Email	Title	ICBA Relationship	Job Functions	Organization
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Mr.	John	Adams		John	zzja@mybank.comzz	Branch Manager	C-Level		MyBank.com
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Mr.	Jason	Anderson		Jason	zzjj@mybank.comzz	Vice President	Employee		MyBank.com
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Ms.	Marquita	Gonzalez		Marquita	783821@commbanku.com	Cashier	Employee	assistant cashier auditor	MyBank.com
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Ms.	Anna	Lincoln		Anna	783816@commbanku.com	Teller	Employee		MyBank.com
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Mr.	John	Smith		John	zzjs@mybank.comzz	President	C-Level		MyBank.com
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Ms.	Cheryl	Tennas		Cheryl	783817@commbanku.com	Customer Service Repres	Employee		MyBank.com
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Ms.	Lakelyn	Tennix		Lakelyn	zzll@mybank.comzz	Teller	Employee		MyBank.com

- You can view the **Job Functions** column in more detail by scrolling to the right within the Roster (use the slider bar at the bottom of the screen), and by expanding the column width between "Job Function" and "Organization".

Organization Roster										+ Add Individual
	Prefix	First Name	Last Name	Suffix	Nickname	Email	Title	ICBA Relationship	Job Function	Organization
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Mr.	David	Frances		David	zzdfrances@mybank.comzz	SVP/Chief Credit Officer	Employee	chief credit	
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Mrs.	Trina	Henderson		Trina	zzhenderson@mybank.comzz	Executive Admin. Assist	Employee	executive/ad	
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Mr.	Robert	Moore		Bob	zz17121@commbanku.comzz	SVP/Chief Financial Offi	C-Level	chief financi	
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Mr.	Jeff	Morris		Jeff	zzjmorris@mybank.comzz	VP Compliance Manager	Employee	compliance c	
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Ms.	Ruth	Newman		Ruth	zz371390@commbanku.comzz		Employee		
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Ms.	Shelly	Ortiz		Shelly	zzsortiz@mybank.comzz	VP, Sr. Operations Mana	Middle Manager	operations of	
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Ms.	Joan	Reukauf		Joan	zzjreukauf@mybank.comzz	President and Chief Exec	C-Level	bancard pri	
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Ms.	Kristi	Wagner		Kristi	zzkwagner@mybank.comzz	Compliance Specialist	Employee	compliance c	

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- If you do not already know which employees are flagged as Bancard Plan Managers in the roster, scroll through the employee list until you spot the Bancard Plan Manager job functions.

Organization Roster					+ Add Individual			
	Prefix	First Name	Last Name	Suffix	Job Functions	Organization	Address Type	Address
Edit Remove	Mr.	David	Frances		chief credit officer senior vice president	MyBank.com	USPS Address	333
Edit Remove	Mrs.	Trina	Henderson		executive/administrative assistant	MyBank.com	USPS Address	333
Edit Remove	Mr.	Robert	Moore		chief financial officer senior vice president	MyBank.com	USPS Address	333
Edit Remove	Mr.	Jeff	Morris		compliance officer	MyBank.com	USPS Address	333
Edit Remove	Ms.	Ruth	Newman			MyBank.com	USPS Address	333
Edit Remove	Ms.	Shelly	Ortiz		operations officer	MyBank.com	USPS Address	333
Edit Remove	Ms.	Joan	Reukauf		bancard primary debit plan manager chief executive	MyBank.com	USPS Address	333
Edit Remove	Ms.	Kristi	Wagner		compliance officer	MyBank.com	USPS Address	333

Add or Remove a Bancard Plan Manager Job Function

Please only add a Bancard Plan Manager job function for the program(s) you have with ICBA Bancard.

1. Once you find the employee you can click the **Edit** button on the left to edit the job function.

Organization: All Relation type: All City: All State: All Filter Reset Back to My Profile Export Roster

All contact info added to roster will be primary. If any additional contact info needs to be updated, please click the "Manage all contact info" next to the specific individual you want to review.

Organization Roster										+ Add Individual
	Prefix	First Name	Last Name	Suffix	Nickname	Email	Title	ICBA Relationship	Job Functions	Organization
Edit Remove	Mr.	John	Adams		John	zzja@mybank.comzz	Branch Manager	C-Level		MyBank.com
Edit Remove	Mr.	Jason	Anderson		Jason	zzjj@mybank.comzz	Vice President	Employee		MyBank.com
Edit Remove	Ms.	Marquitta	Gonzalez		Marquita	783821@commbanku.com	Cashier	Employee	assistant cashier auditor	MyBank.com
Edit Remove	Ms.	Anna	Lincoln		Anna	783816@commbanku.com	Teller	Employee		MyBank.com
Edit Remove	Mr.	John	Smith		John	zzjs@mybank.comzz	President	C-Level		MyBank.com
Edit Remove	Ms.	Cheryl	Tennas		Cheryl	783817@commbanku.com	Customer Service Repres	Employee		MyBank.com
Edit Remove	Ms.	Lakelyn	Tennix		Lakelyn	zzlt@mybank.comzz	Teller	Employee		MyBank.com

2. Add or delete the applicable Bancard job function(s).
3. All ICBA Bancard job functions begin with "Bancard." Please use only credit and debit Plan Managers for this job function update. **Full definitions for these job functions are on pages 2-3.**
 - Bancard Primary Credit Plan Manager (one per bank)
 - Bancard Credit Plan Manager
 - Bancard Credit Card Fraud Contact
 - Bancard Primary Debit Plan Manager (one per bank)
 - Bancard Debit Plan Manager
 - Bancard Debit Card Fraud Contact

You may choose more than one job function by entering them individually or holding the **Control (Ctrl)** button on your keyboard while selecting from the dropdown menu.

Organization Roster					+ Add Individual
	Name	ICBA Relationship	Job Functions	Organization	Address Type
Save Cancel	VP/Chief Credit Officer	Employee	Bancard	MyBank.com [Bank Head Office]	USPS Address
	Executive Admin. Assist	Employee	bancard credit card fraud contact	MyBank.com	USPS Address
Edit Remove	VP/Chief Financial Officer	C-Level	bancard credit plan manager	MyBank.com	USPS Address
Edit Remove	Compliance Manager & BSA Of	Employee	bancard debit card fraud contact	MyBank.com	USPS Address
Edit Remove		Employee	bancard debit plan manager	MyBank.com	USPS Address
Edit Remove	Sr. Operations Manager	Middle Manager	bancard merchant plan operations officer	MyBank.com	USPS Address
Edit Remove	President and Chief Executive Office	C-Level	bancard primary debit plan manager chief executive	MyBank.com	USPS Address
Edit Remove	Compliance Specialist	Employee	compliance officer	MyBank.com	USPS Address
Edit Remove					

Please **do not** use the following job functions. They are unrelated to your credit and/or debit issuing program with ICBA Bancard.

- Bancard TCM BCM Manager
- Bancard TCM Plan Manager
- Bancard Online App Plan Manager
- Bancard Primary Merchant Plan Manager
- Bancard Merchant Plan Manager

4. Once all changes are complete, click the **Save** or **Close** button depending on what screen you are editing.

APPENDIX

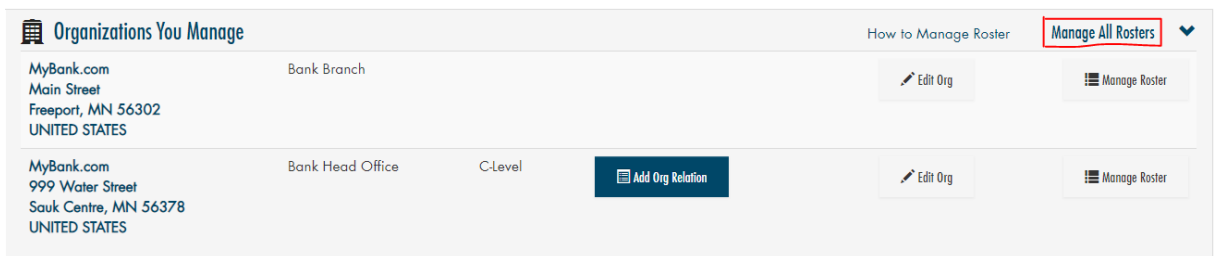
The information above is curated specifically to help ICBA Bancard client banks manage their Bancard Plan Manager job functions. If you would like to see the ICBA’s full **Organization Profile Guide**, go to www.icba.org/manageprofile. The full guide will provide additional information on how to view and manage your bank’s roster and branches. The information below provides a reference that may be of interest while completing your Bancard Plan Manager update.

Export Your Roster to View All Employees

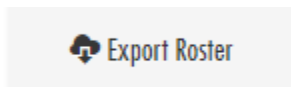
If you would like to view all employees currently listed in the roster, you can export the full roster into an Excel spreadsheet. The spreadsheet will show employee name, title, email and ICBA ID number. Please note that the **Bancard Plan Manager** job functions are not shown on the exported roster. The Excel document will, however, give you an at-a-glance view of all employees at the bank to help you see who needs to be removed or added.

To export your roster, follow these steps:

1. Visit www.icba.org and login on the upper right corner using your email and password.
2. Click on **My Account** in the upper right corner.
3. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters**.



4. In the upper right, click the **Export Roster** button.



Know the Profile Fields

After updating an employee's Bancard Plan Manager job function, use the following information as a guide for any additional edits that may be required.

When completing fields, please enter data using mixed case (upper and lowercase letters) and standard capitalization rules.

Prefix	First Name	Last Name	Suffix	Nickname
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

1. **Prefix** – Required field.
2. **First Name** – Required field.
3. **Last Name** – Required field.
4. **Suffix** – If applicable, not required.
5. **Nickname** – Required field.

Email	No Email Available	New Password	Confirm Password	Title	ICBA Relationship	Job Functions
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Employee	<input type="text"/>

6. **Email** – An email address is required for all new accounts as this is their “user name” for accessing www.icba.org. If the employee has an individual email, enter the email address. *Note: Everyone must have a unique email address.* If the employee does not have an individual bank assigned email then, leave the field blank and check the box **No Email Available**. A system generated email address will be issued once the account is created (xxxxxx@commbanku.com). Share this computer-generated email address with the new employee to give them access. *Note: The computer-generated email address is only intended for use as the individual's user name to access our web site.*

ICBA Bancard credit and/or debit clients are encouraged to submit a functional email address for all Bancard Plan Managers. This ensures communications regarding your program reach the contacts who need to receive them.

7. **New Password** – You can choose to create a password for the new employee to get them started, but it is not a requirement. **If the employee does not have a legitimate email address you MUST create a password for them if they need to access the system.** Keep in mind:
 - a. *Passwords are case sensitive – there are no length or character requirements.*
 - b. If you *do* create a password for another employee, the employee will receive an email from info@icba.org stating their password has been changed. ICBA recommends employees change their password to something only they know once they've logged in. Provide the employee with the following instructions:
 - i. Go to www.icba.org.
 - ii. Click on **Member Login** in the upper right corner.
 - iii. Enter your email and the password provided to you and click the **Login**.
 - iv. Click on **My Account** in the upper right corner.
 - v. Click on **Change My Password** found at the bottom of the list in the **My Account Links** box on the right side of the screen.
 - vi. Enter your new password twice and click **Save**.
 - vii. You will receive an email from info@icba.org stating that your password has been changed (if you have a legitimate email address).
8. **Confirm Password** – If you entered a password in the **Password field**, re-enter it in this field.
9. **Title** – The job title is a required field.

Add a New Employee

If you find one of your debit or credit department employees is not listed on the roster, you can add a new employee then add the appropriate job function to their profile. For this Bancard job function update initiative, all Bancard Plan Managers (Primary or otherwise) have temporarily been given C-Level status which allows you to add employees to the roster as follows:

1. Visit www.icba.org and login on the upper right corner using your email and password.
2. Click on **My Account** in the upper right corner.
3. Scroll down to the **Organizations You Manage** box and click the **Manage Roster** button next to **Location** to designate where you want the new employee added. If you do not see an **Organization You Manage** box, contact ICBA at info@icba.org or 1-800-422-7285.

4. Click **+Add Individual** on the right side

	Prefix	First Name	Last Name	Suffix	Nickname	Email	Title	ICBA Relationship	Job Functions	Organization
Edit	Mr.	John	Adams		John	zzja@mybank.com.zz	Branch Manager	C-Level		MyBank.com
Edit	Ms.	Lakelyn	Tennix		Lakelyn	zzl@mybank.com.zz	Teller	Employee		MyBank.com

5. Complete each of the fields on the new blank line. You may use the tab button to move from field to field or use your mouse to click into each field. If using your mouse, you must scroll to the right to view the additional fields. (See the **Know the Profile Fields** section for more information). Enter data using mixed case (upper and lowercase letters) and standard capitalization rules.

6. When all fields are complete, click the **Save** button on the left side of the screen.

7. If no duplicate or similar names are found, the new employee is added and is listed alphabetically by last name. **For employees without a unique email address, you will need to find the new employee and notate the system-generated email address to allow them to login to icba.org and access ICBA programs.**

8. If a potential duplicate account is found in the system when attempting to add an employee, the following screen will appear:

Duplicate records found.

If the individual you are adding is **not an exact match** in the list below, [Click here](#) to add the new individual.

If the individual you are adding is in the list below, click **Edit This Individual** next to the name.

If you need further assistance, please contact ICBA at 800-422-7285.

 Accounts Found:		
Edit This Individual	414517	Johnson, Cindy
Edit This Individual	599064	Jensen, Cindy

- a. If a matching name appears in the **Accounts Found** box, you must determine if this is the same person you are attempting to add.
 - i. If the **Organization** of a potential match appears and is the same as your organization, but the person is at a different location, click **Edit This Individual** and change their **Organization** (location). After editing, click **Save**.
 - ii. If the **Organization** of a potential match appears and looks like the organization that your new employee worked at before, double check with the individual first, then click **Edit this Individual** and change the appropriate fields to match their current position at your organization. When you're finished click the **Save** button.
 - iii. If there is an exact match and all the displayed information is correct, then the employee you are attempting to add has already been set up. Click the **Cancel** button next to the new entry you started.
- b. If there is not an exact account match in the **Accounts Found** box or you are uncertain if a potential match is a duplicate, click on **Click Here to Add the Individual Anyway** and he/she will be added to the roster. *Note: This can happen when an employee leaves the organization, is deleted, and later is rehired. Note: Removal from your organization does not remove employees from ICBA's database.)*

Remove an Employee

Important note: Please do not remove employees unless they are no longer with the organization as they may be enrolled in other important ICBA programs. Also, if an employee changes bank locations/branch, do not remove the employee, but edit their profile.

1. Visit www.icba.org and login on the upper right corner using your email and password.
2. Click on **My Account** in the upper right corner.
3. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters**.

4. From this screen you can filter and sort the report in several ways to find the employee you want to remove or simply click through the pages until you find the individual (listed by last name in alphabetical order). You can choose from any of the dropdowns at the top of the screen and click the **Filter** button or you can click on any of the column headers within the **Organization Roster** to sort.

All contact info added to roster will be primary. If any additional contact info needs to be updated, please click the "Manage all contact info" next to the specific individual you want to review.

Organization Roster											+ Add Individual
	Prefix	First Name	Last Name	Suffix	Nickname	Email	Title	ICBA Relationship	Job Functions	Organization	
Édit Remove	Mr.	John	Adams		John	zzja@mybank.comzz	Branch Manager	C-Level		MyBank.com	
Édit Remove	Mr.	Jason	Anderson		Jason	zzji@mybank.comzz	Vice President	Employee		MyBank.com	
Édit Remove	Ms.	Marquitta	Gonzalez		Marquita	783821@commbanku.com	Cashier	Employee	assistant cashier auditor	MyBank.com	
Édit Remove	Ms.	Anna	Lincoln		Anna	783816@commbanku.com	Teller	Employee		MyBank.com	
Édit Remove	Mr.	John	Smith		John	zzjs@mybank.comzz	President	C-Level		MyBank.com	
Édit Remove	Ms.	Cheryl	Tennas		Cheryl	783817@commbanku.com	Customer Service Repres	Employee		MyBank.com	
Édit Remove	Ms.	Lakelyn	Tennix		Lakelyn	zzlk@mybank.comzz	Teller	Employee		MyBank.com	

5. When you find the employee, click the **Remove** button.
6. A confirmation box will appear to ensure you want to remove this employee. Click Yes, remove employee or No.

If you have any questions regarding your ICBA Bancard program or this Bancard Plan Manager update, please contact the ICBA Bancard client relations team at (800) 242-4770 or Bancard@icba.org.