Online Certification Portfolio

**COMMUNITY BANKER
UNIVERSITY**®
powered by ICBA

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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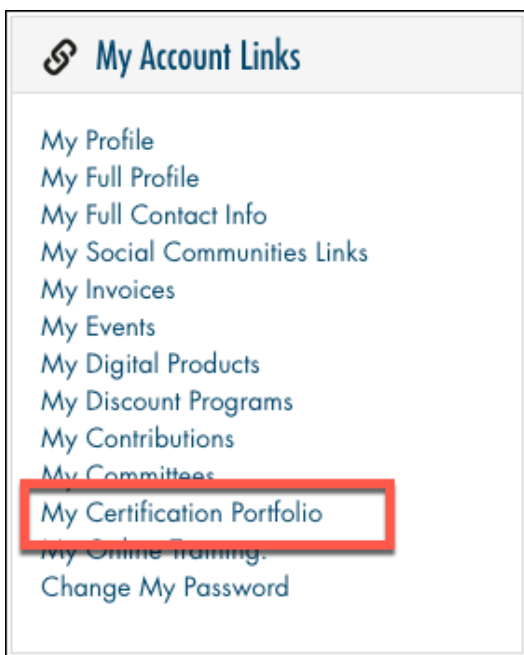ICBA
CERTIFICATION
PROGRAM

Accessing the Online Certification Portfolio system

- Navigate to ICBA.org, click on **Member Login** and enter your username and password:

Join ICBA   Contact ICBA   Member Login

ICBA

Calendar f y in ▶   ♀ Find A Community Bank

About Us   **News**   **Events**   **Advocacy**   **Compliance**   **Education**   **Solutions**   🔍

- 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.

🔗 My Account Links

My Profile
My Full Profile
My Full Contact Info
My Social Communities Links
My Invoices
My Events
My Digital Products
My Discount Programs
My Contributions
My Committees
My Certification Portfolio
My Online Training
Change My Password

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 (when applicable)
    - A list of your current designation(s)
    - Your Cycle Start Date and Cycle End Date
    - Current CPE submission progress

HOME

Hello James

Note: When reporting Live Virtual training for your CPE, be sure to choose either ICBA Live In-Person/Virtual Seminar or Non ICBA Live In-Person/Virtual Seminar from the Course Type dropdown menu.

Certification Designation(s) – Click title to manage	Cycle Start Date	Cycle End Date	CPE Credit Progress
CERTIFIED COMMUNITY BANK COMPLIANCE OFFICER	1/1/2018	12/31/2019	52%

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:

HOME				JH ☰
Hello James				
Note: When reporting Live Virtual training for your CPE, be sure to choose either ICBA Live In-Person/Virtual Seminar or Non ICBA Live In-Person/Virtual Seminar from the Course Type dropdown menu.				
Certification Designation(s) – Click title to manage		Cycle Start Date	Cycle End Date	CPE Credit Progress
CERTIFIED COMMUNITY BANK COMPLIANCE OFFICER		1/1/2018	12/31/2019	52%

CPE Credits

- To view the details of your CPE submissions for a specific designation or to report additional items for consideration click the Certification Title button to access the Certification Summary screen:

HOME				JH ☰
Hello James				
Note: When reporting Live Virtual training for your CPE, be sure to choose either ICBA Live In-Person/Virtual Seminar or Non ICBA Live In-Person/Virtual Seminar from the Course Type dropdown menu.				
Certification Designation(s) – Click title to manage		Cycle Start Date	Cycle End Date	CPE Credit Progress
CERTIFIED COMMUNITY BANK COMPLIANCE OFFICER		1/1/2018	12/31/2019	52%

- 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)
- On the Certification Summary screen you will see specific numbers of CPE required, approved, pending and the number from live events.

Reminder: You must earn a minimum of half (50%) of the required CPE credits for this certification through attendance at a live, in-person or livestreamed event where there is interaction between the attendees and the ability to interact with the speaker. This can be accomplished by attending one of ICBA's Institutes or seminars or through a live, in-person or livestreamed education training program from another source provided the topic is relevant to your certification.

- Click the View button to see the specific CPE submissions:

- If your certification is in good standing, you will be able to obtain a certificate:

- Click the Report CPE button to add completed training:

HOME   MS ≡

Certification Designation: Certified Community Bank Compliance Officer

87%

VIEW CERTIFICATE	
REPORT CPE	
CURRENT CYCLE SUBMISSIONS	
SUBMISSION HISTORY	

Status: In good standing
Cycle Start Date: 1/1/2021
Cycle End Date: 12/31/2022

CPE Required: 30.00
CPE Approved: 26.00   VIEW
CPE Pending: 0
CPE Live Events: 16.00
Comments: 0

- This will bring up the Add CPE credit form:

IMPORT FROM ICBA ONLINE EDUCATION CENTER

Course Type

Course Title

Course Description

Date Completed (mm/dd/yyyy)

CPE Credits   0

Comment

Choose File   No file chosen

Document Upload
(i.e. Certificate, Receipt, Agenda, etc.)
1. Document size limit: 40M
2. Accepted file format: PDF, JPG, GIF, PNG

Note - If the file is not in one of these formats try to use File, Save As to change the format or scan/take a photo of the file.

CANCEL   SUBMIT

- For those who are employed by a bank that subscribes to ICBA's Online Training, you can import your online course completion data by click the "Import From ICBA Online Education Center" button. Using this feature will import the details of your course completion into the fields on this screen and you do not need to attach your certificate of completion.

IMPORT FROM ICBA ONLINE EDUCATION CENTER

Course Type

Course Title

Course Description

Date Completed (mm/dd/yyyy)

CPE Credits   0

Comment

Choose File   No file chosen

Document Upload
(i.e. Certificate, Receipt, Agenda, etc.)
1. Document size limit: 40M
2. Accepted file format: PDF, JPG, GIF, PNG

Note - If the file is not in one of these formats try to use File, Save As to change the format or scan/take a photo of the file.

CANCEL   SUBMIT

- For all other training, select the course type that you are submitting using the drop-down menu:

ICBA Live In-person/Virtual Seminar
ICBA Online Training
ICBA Webinar
Non ICBA Live In-Person / Virtual Seminar
Non-ICBA Online Training
Non-ICBA Webinar

- For Non-ICBA training you will be required to provide the following course details in the corresponding text fields:
    o Course Provider
    o Title
    o Description
    o Date of completion
    o Number of CPE credits based on the formula of 1 CPE credit per 50 minutes of training
    o 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.

- 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. In the Document Upload area, click the Choose File button to upload the document. If you don't have an electronic copy, please scan or take a photo of the file in order to upload it.

- Once you have completed the form click SUBMIT. The CPE submission will then appear in the pending section of the CPE Submission screen

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.

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)	Edit
ICBA Education Online Training	Online: Bank Secrecy Act - BSA and Compliance Officers - 12/31/2019	ICBA Education Online Training	12/31/2019	1.00	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.

Course Type	Course Title	Course Description	Document Completion	CPE Credits	Documentation (upload a certificate or receipt)	Comment(s)	Edit
ICBA Education Online Training	Online: Bank Secrecy Act - BSA and Compliance Officers - 12/31/2019	ICBA Education Online Training	12/31/2019	1.00	UPLOAD [View]	[Read]	✏ ×

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 [VIEW CERTIFICATE] button on the Certification Summary screen:

- 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:

Submission History

To obtain a report of all the CPE submissions made for the **<u>current cycle</u>**, click the Current Cycle Submissions button on the Certification Summary screen:

To obtain a report of all the CPE submissions ever made over all cycles for this designation, click the Submission History button on the Certification Summary screen:

Resources

- In order to help you we have included some reference and optional navigation within the menu button located in the upper right corner of the screen:
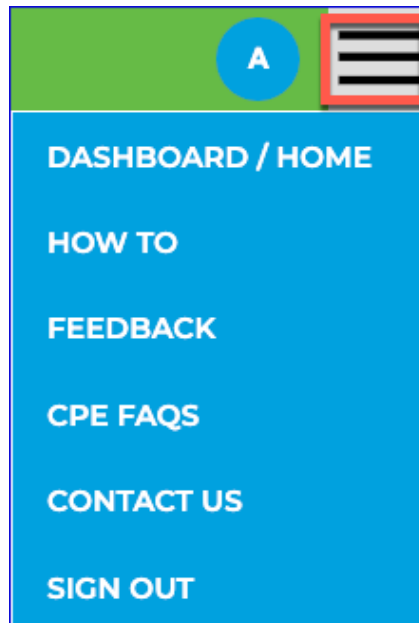
- o How To – this link will provide you with a step-by-step guide on how to use the service
- o Feedback – Opens a survey so you can provide ICBA with your feedback on the service
- o CPE FAQs – provides details on the terms and conditions of ICBA certifications
- o Contact Us – provides phone and email 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 or virtual live-streamed 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