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.

Please update your Bancard Plan Managers by March 15, 2021.

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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.
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](http://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.
5. 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”.

6. 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.
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.

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.

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.

1. **Prefix** – Required field.
2. **First Name** – Required field.
3. **Last Name** – Required field.
4. **Suffix** – If applicable, not required.
5. **Nickname** – Required field.
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 (*xxxxx@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](http://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](http://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.

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.

<table>
<thead>
<tr>
<th>Accounts Found</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit This Individual</strong></td>
</tr>
<tr>
<td><strong>Edit This Individual</strong></td>
</tr>
</tbody>
</table>

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](http://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**.

![Organizations You Manage](image)

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.

![Organization Roster](image)

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.

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