2026

ICBA Education

Online Certification Portfolio Guide

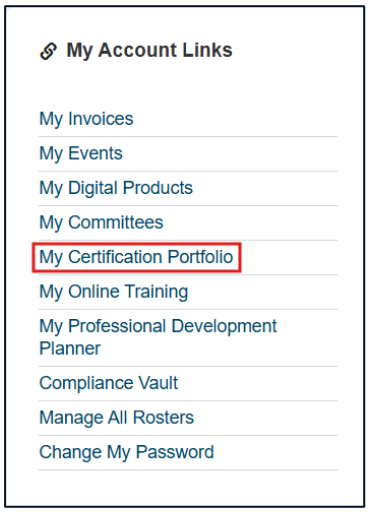
Welcome to the Online Certification Portfolio Guide. This document will provide you with an overview of how to navigate the Certification Portfolio site, submit Continuing Professional Education credits (CPEs), and pay annual certification fees. For further information or assistance, please contact certification@icba.org.

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Accessing your Online Certification Portfolio

- Go to ICBA.org, click on **Member Login** in the upper right, and enter your username and password.
    - If you have forgotten your password or need to request access to ICBA.org please click the appropriate link below the login area.
- Once you are logged in, click the **My Account** button.
- The **My Account Links** box will open. In the My Account Links box, click the **My Certification Portfolio** link:



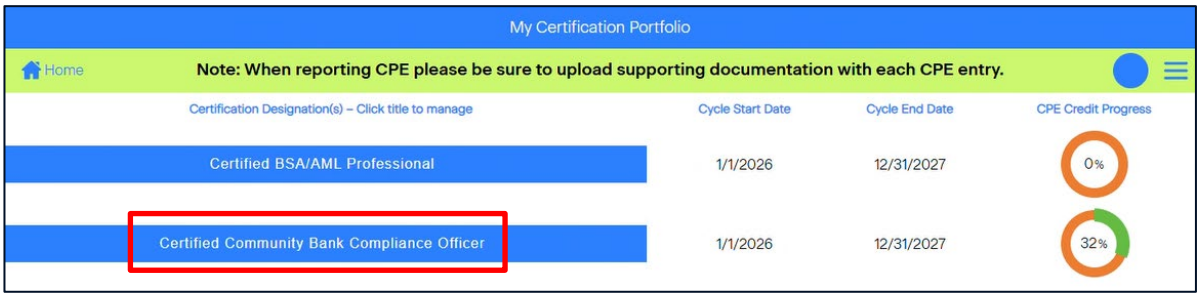
Welcome Message

- 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 (if applicable).



CPE Credits

- To view the details of your CPE submissions for a specific designation or to report additional CPE, click the designation title to access the Certification Summary screen:



- 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 the numbers of CPE required, approved, and pending, and the total earned 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, livestreamed event or live webinar where there is interaction between the attendees and/or 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, livestreamed education training or live webinar program from another source provided the topic is relevant to your certification.

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



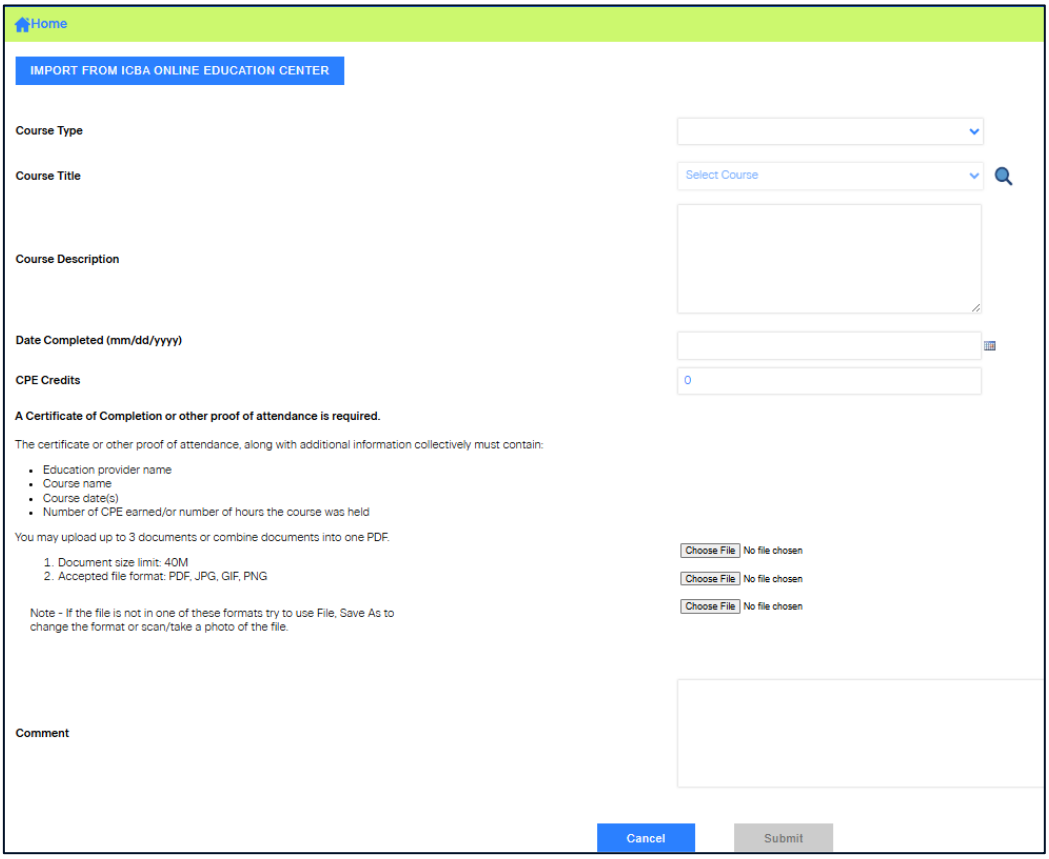
- If your certification is in good standing, you can access your certificate by clicking the **View Certificate** button:



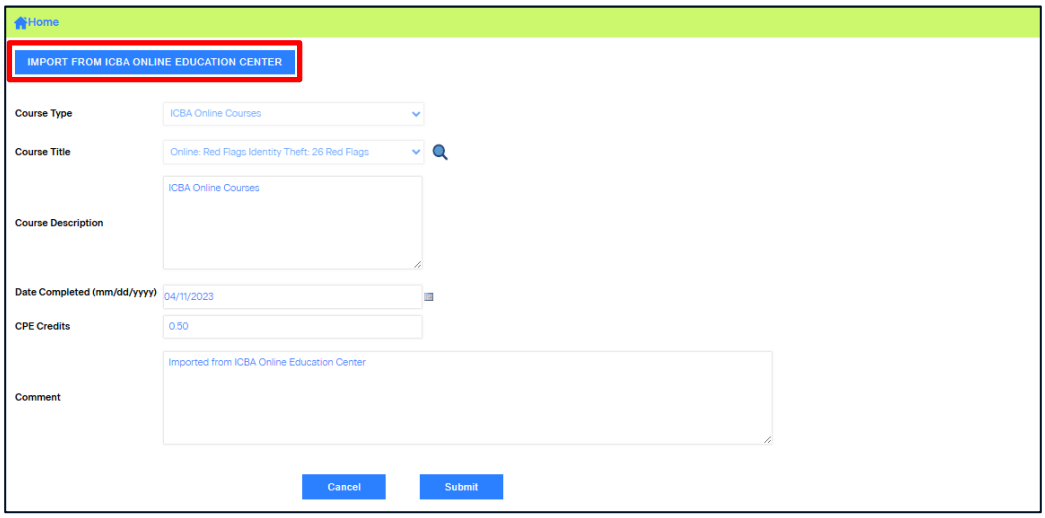
- Click the **Report CPE** button to add completed training:



- This will bring up the Add CPE credit form:



- For those who are employed by a bank that subscribes to ICBA's Online Training, you can import your online course completion data by clicking 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.



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



- For non-ICBA training you must provide the following course details in the corresponding text fields:
    - Course Provider
    - Title
    - Description
    - Date of completion
    - Number of CPE credits (1 CPE credit = 50 minutes of training)
    - Comment (optional)

- For all ICBA related courses, use the Course Title drop down to select the relevant training. The description and CPE credit fields will automatically be populated so that the only fields you need to complete are the date of completion and comment.

- To validate the CPE submission, you must provide supporting documentation. Supporting documentation is required for all CPE.

    - Examples of qualified documentation include a certificate of completion/attendance or a copy of a sign-in sheet from the event showing the date(s) and start/end times to validate your attendance.
    - NOTE: receipts, confirmations, agendas or event materials are NOT eligible as supporting documentation.
    - *ICBA Education strictly enforces the supporting documentation requirement.*

- 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 document 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. 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 the X for the appropriate submission.



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

- ICBA Education does not send current status certificates. If your certification is current, you can download or print your certificate from within the certification portfolio.

- To access your certificate, click 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 review all the CPE submissions made for the current cycle, click the **Current Cycle Submissions** button on the Certification Summary screen:

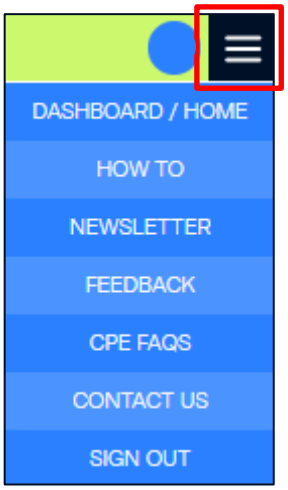


- To review all the CPE submissions made for all cycles, click the **Submission History** button on the Certification Summary screen:



Resources

- There are additional resources located under the menu button in the upper right corner of the screen to assist you:



  - How To – a link to this Online Certification Portfolio Guide
  - Feedback – opens a survey to provide feedback regarding the Online Certification Portfolio website
  - CPE FAQs – provides details on Continuing Professional Education requirements and how to maintain your ICBA certification
  - Contact Us – provides contact information for ICBA Education staff if you would like to reach out for assistance

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 – Certification is granted by an association or other non-government organization to individuals who meet predetermined qualifications established by the association or organization. A certification program uses a board of professionals to review instructional materials and applies a testing instrument to measure the 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.

Annual Certification Fee – The annual fee billed by ICBA for maintaining your certification records.

Live Training – In-person, on-site, instructor led classroom training, virtual/livestreamed training, or live webinars. Live training must include opportunities to interact with the instructor, for example, the ability to ask a question. ICBA Education seminars and institutes, both in-person and livestreamed, are examples of live training.

Maintenance Cycle – The two-year time-period in which you must meet certain criteria to remain certified. The first Maintenance Cycle begins on January 1 of the year following initial certification. The duration of each 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 - Computer Based Training, Internet/Online Courses or Self Study courses.

Supporting Documentation - Qualified supporting documentation for CPE includes a certificate of completion/attendance, a copy of a sign-in sheet from the event, or other document validating attendance. All supporting documentation must include the attendee's name, entity providing the training, course title/description, date(s) of training, and the number of CPE provided or the start/end times of the session(s). NOT eligible as documentation are receipts, confirmations, agendas, or event materials.