



ICBA Roster Management Guide

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1. Employee Roster Management – Special Note

Before adding, editing, or deleting an individual, review your organization’s current employee roster to determine if an individual profile already exists, and his/her location, among other details.

2. Exporting Employee Roster with ICBA

To export your roster, follow these steps:

1. Go to www.icba.org
2. Click **Login** in the upper right corner
3. Enter the email and password for your ICBA account
4. Click your name in the upper right corner and select **My Account**
 - This will open your account page in a new window.
5. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters**
 - Or click the **Manage All Rosters** link found towards the top of the page in the **My Account Links** box

Organizations You Manage ▼

How to Manage Roster ?

Manage All Rosters

ABC Bank Branch Test PO Box 267 TEST Sauk Centre, MN 56378 UNITED STATES	Bank Branch	C-Level	Edit Org	Manage Roster
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My Account Links

My Invoices

My Events

My Digital Products

My Committees

My Certification Portfolio

My Online Training

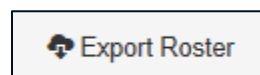
My Professional Development Planner

Compliance Vault

Manage All Rosters

Change My Password

6. In the upper right, click the **Export Roster** button
7. Your bank’s roster will be exported to an Excel document to your downloads folder
 - Use this document to work from to determine who is missing, needs to be edited, or removed from your roster.



- You will make all those changes on the website, not in the Excel document.

Note: If at any time you need to get back to your **Organizations You Manage** or **My Profile** screen, click the **Back to My Profile** button.

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

All contact info added to roster will be primary.

Organization Roster
Add Individual

3. Employee Accounts

3.1 Adding a New Employee

There are two ways in which a new employee can be added to the system:

- An administrator can add the new employee to the bank's roster
- The employee may set up their own account (if they have a legitimate email address), which will connect them to the bank

Note: The preferred method is the administrator creates the new accounts.

3.2 Bank Administrator Creating New Account

Steps:

1. Go to www.icba.org
2. Click **Login** in the upper right corner
3. Enter the email and password for your ICBA account
4. Click your name in the upper right corner and select **My Account**
 - This will open your account page in a new window.
5. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters**
 - Or click the **Manage All Rosters** link found towards the top of the page in the **My Account Links** box

Organizations You Manage
How to Manage Roster
Manage All Rosters

ABC Bank Branch Test
Bank Branch
C-Level
Edit Org
Manage Roster

PO Box 267
TEST Sauk Centre, MN 56378
UNITED STATES

 **My Account Links**

[My Invoices](#)

[My Events](#)

[My Digital Products](#)

[My Committees](#)

[My Certification Portfolio](#)

[My Online Training](#)

[My Professional Development Planner](#)

[Compliance Vault](#)

[Manage All Rosters](#)

[Change My Password](#)

6. Click the **+Add Individual** button on the right-side top of the employee grid

Organization:
Relation type:
City:
State:
Filter
Reset

Export Roster
Back to My Profile

All contact info added to roster will be primary.

 Organization Roster

+ Add Individual

Prefi	First Name	Last Name	Suffix	Nickname	Email	Title	ICBA Account Permissions ?	Job Functions

7. Complete each of the fields on the newly inserted blank row at the top of the employee roster grid

- 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

Note: Please enter data using mixed case (both upper and lowercase letters) and standard capitalization rules.

 Organization Roster
 + Add Individual

	Prefix	First Name	Last Name	Suffix	Nickname	Email	No Email Available
Save Cancel							☐

- a. **Prefix** – Required field
- b. **First Name** – Required field
- c. **Last Name** – Required field
- d. **Suffix** – If applicable, not required
- e. **Nickname** – Required field
- f. **Email** – Required field
- An email address is required for all new accounts as this is their “username” to access the system.
 - If the employee has a legitimate email, enter their email address.
 - Duplicate email addresses may not be used. Everyone must have their own unique email address.
 - If the employee does not have a legitimate email:
 - Leave the email field blank.
 - Check the **No Email Available** box and a fictitious email address will be generated for them once their account is created (xxxxxx@commbanku.com).

 Organization Roster
 + Add Individual

	New Password	Confirm Password	Title	ICBA Account Permissions ⓘ	Job Functions
Save Cancel				Employee	

- g. **New Password** – Required field
- You may choose to create a password for the new employee to get them started. It is not required.
 - However, if the employee does not have a legitimate email address you **MUST** create a password for them as they cannot reset their password on their own.
 - We recommend you set a password on their account and tell them to change it afterwards.

If you do not create a password for the employee:

- They must follow the Password Reset instructions in the [Password Reset](#) section of this guide.

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.
- We also suggest you have them change their password to something only they know once they've logged in.

Provide the employee with the following instructions:

- Go to www.icba.org
- Click **Login** in the upper right corner
- Enter the email and password for your ICBA account
- Click your name in the upper right corner and select **My Account**
 - This will open your account page in a new window.
- Click **Change My Password** found at the bottom of the list in the **My Account Links** box
- Enter your new password twice and click the **Save** button.
- You will receive an email from info@icba.org stating that your password has been changed (if you have a legitimate email address).

Notes:

- Employees who do not have a legitimate email address may change their email address this same way, they just cannot reset their password on their own if they have forgotten it.
- Passwords are case sensitive – there are no other requirements for length or character type.

h. Confirm Password – Required field

- If you entered a password in the **Password** field, you must re-enter the password in this **Confirm Password** field

i. Title – Required field

j. ICBA Account Permissions – Required field

- This field determines what the employee can do within the bank's online ICBA account

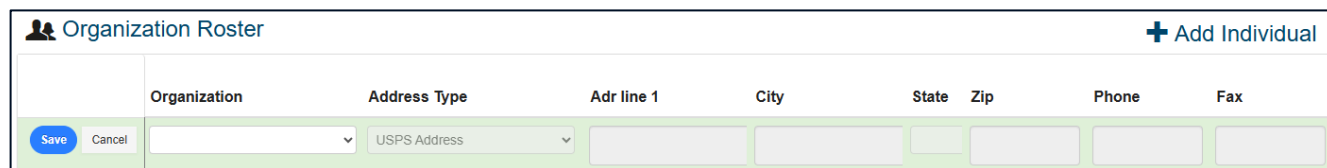
Choose one of the following options from the dropdown:

- Employee – Can manage their own account and no others
- Middle Manager – Can manage individuals only at the location they are linked to
- C-Level – Can manage individuals at any branch or head office location they are affiliated with, as well as manage organization locations and demographics
 - **LMS Administrators must be C-level**

k. Job Functions

- This field captures an employee's role within the bank.
- Indicates which relevant marketing communications they receive from ICBA.
- You may select more than one job function:
 - Choose individually or hold the Control key on your keyboard while selecting from the dropdown.

Note: If you need to add an employee as an LMS Administrator, you must contact an ICBA Education Team member.

The screenshot shows a web form titled "Organization Roster" with a "+ Add Individual" button in the top right. The form has a header row with labels: "Organization", "Address Type", "Adr line 1", "City", "State", "Zip", "Phone", and "Fax". Below the header is a row of input fields. The "Organization" field is a dropdown menu. The "Address Type" field is a dropdown menu with "USPS Address" selected. The "Adr line 1", "City", "State", "Zip", "Phone", and "Fax" fields are text input boxes. On the left side of the form, there are "Save" and "Cancel" buttons.

l. Organization

- Select the location from the dropdown list.
- The address information will pre-fill once an organization is selected.

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

If no duplicate or similar names are found:

- The new employee is added.
- The new employee can be found in the roster alphabetically by last name.
- For employees that do not have a legitimate email address, find the new employee and notate the system-generated email address.

If a potential duplicate account is found:

- A "duplicate warning" message appears on screen
- Please refer to the pages in this guide for [Duplicate Accounts](#)

3.3 Employee Creating Own Account:

1. Go to www.icba.org
2. Click **Login** in the upper right corner
3. Click on **Create an account** under the **Login** button

Please sign in or create a new user account. If your login information is displayed below, then you are already logged in.

Email:

Password:

☐ Remember me
Uncheck if on a public computer

[Forgot your password?](#)
[Create an account](#)

4. Enter your email address and click **Continue**

- You will receive an email from info@icba.org to the email address entered with instructions to complete your account setup. Two things to note regarding the email and continued account setup:
 - To receive appropriate access rights and ICBA benefits, make sure that you select an organization from the dropdown list of existing organizations that appear when typing
 - The link is valid 24 hours from the time of receipt
- If you did not receive the email, please check your spam or quarantine. Also, ask your IT department to whitelist the following to receive emails:
 - IP addresses (3.210.190.250 and 54.174.60.230),
 - domain icba.org, and 5005401m.icba.org, and 5005401t.icba.org,
 - main email address info@icba.org

Note: Whitelisting ICBA's email domain does not affect your bank's email security or deactivate your spam filter.

3.4 Duplicate Account / Rehired Employee / Reused Email Address – Special Note

When you attempt to add an individual to your bank's roster through the Manage All Rosters section of our website, our system will do some validation and return a message if it detects this as a possible duplicate account in our system. It will look for exact name matches; similar name matches and same email address values. Depending on the value and situation you could see a couple of different warning messages.

A duplicate account means this is the same person as an existing account in our system, this could be a situation of a rehired employee or a new hire who already has an account with ICBA from a previous employer.

This could also be a situation of a reused email address when the account existing with ICBA is NOT the same person as the account you are creating, but the email address you are trying to

use on their new account is already in use with ICBA. There are different sets of instructions below depending on which scenario fits your instance.

3.5 Duplicate Account

If a potential duplicate account is found in the system that is “similar” to the account you are attempting to add, the following will appear on screen above the roster grid:

Duplicate records found.
If the individual you are adding is not an exact match in the list below, **Click here** to continue adding the new individual.

If the individual you are adding is in the "Accounts Found" section below, click the "**Select this Record**" option next to the individual's name. You must then click the "**Save**" button to the left of the top row in the grid for the record you had entered the new information for. **This will be an Update instead of an Add for your new record.**

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

 **Accounts Found:**

Select this Record				
---------------------------	--	--	--	--

- If a matching name appears in the **Accounts Found** box, you must determine if this is the same person you are attempting to add.
- If an individual of a potential match appears and is the same as your individual but the person is at a different location, double check with the individual first, then click **Select this Record** by the matching record in the **Accounts Found** section of the warning. Then you must click the **Save** button to the left of the row for the record you are adding, and it will update the existing record with the information you supplied vs creating a duplicate.
- If there is an exact match and all information is correct, the new employee you are attempting to add is already set up. Click the **Cancel** button to the left of the row for the new entry you started.

 **Organization Roster**

	Prefix
Save Cancel	

- If there is not an exact account match in the **Accounts Found** box or you are uncertain if a potential match is an exact match, click on the **Click here** link to continue adding the new individual and they will be added to the system.

Note: This may happen when an employee leaves the bank, they are removed from the bank roster, and then later that person returns to the bank to work. Even though they were removed from your bank’s roster, they are NOT removed from the ICBA system. You will want

to bring back their original account to your roster by clicking the **Select this Record** option from step 1 above.

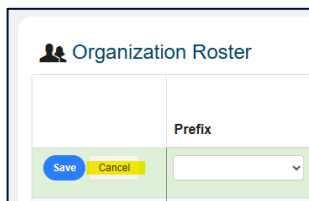
Duplicate records found.

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

If the individual you are adding is in the "Accounts Found" section below, click the "**Select this Record**" option next to the individual's name. You must then click the "**Save**" button to the left of the top row in the grid for the record you had entered the new information for. **This will be an Update instead of an Add for your new record.**

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

- If an individual of a potential match appears and is the same as your individual but the person is at a different Organization or location of your organization, double check with the individual first, then click **Select this Record** and change their Organization (location) and all of the appropriate fields to match their current position at your bank. After editing, click the **Save** button.
- If there is an exact match and all information is correct, the new employee you are attempting to add is already set up. Click the **Cancel** button next to the new entry you started.



The screenshot shows a web form titled "Organization Roster" with a person icon. Below the title is a table with one row. The first column is empty, and the second column is labeled "Prefix" and contains a dropdown menu. To the left of the table are two buttons: "Save" (blue) and "Cancel" (yellow).

3.6 Reused Email – Email already exists on an account with ICBA

If the account you are attempting to create contains an email address value that already exists on an account in the ICBA system, the following will appear on screen above the roster grid.

The email you entered is already associated with an ICBA account. Contact us at info@icba.org or 800-422-7285 if you need assistance.

If the individual you are adding is in the "Accounts Found" section below, click the "**Select this Record**" option next to the individual's name. You must then click the "**Save**" button to the left of the top row in the grid for the record you had entered the new information for. **This will be an Update instead of an Add for your new record.**

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

 **Accounts Found:**

- If you see the message of **The email you entered is already associated with an ICBA account** – you will not be able to create another account with this email address value.
- Review the **Accounts Found** section. This will show the account in the ICBA System that has the email address value from the record you were attempting to create.

- If this is the same employee you were attempting to create the account for, follow these instructions.
 - If an individual of a potential match appears and is the same as your individual but the person is at a different location or doesn't have a location as they were previously removed from your bank roster, double check with the individual first, then click the **Select this Record** link by the matching record in the **Accounts Found** section of the warning. Then you must click the **Save** button to the left of the row for the record you are adding and it will update the existing record with the information you supplied vs. creating a duplicate.

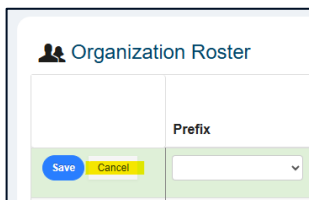
If the individual you are adding is in the "Accounts Found" section below, click the "Select this Record" option next to the individual's name. You must then click the "Save" button to the left of the top row in the grid for the record you had entered the new information for. **This will be an Update instead of an Add for your new record.**

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

Accounts Found:

Select this Record

- If there is an exact match and all information is correct, the new employee you are attempting to add is already set up. Click the **Cancel** button to the left of the row for the new entry you started. Search the **Manage All Rosters** grid to locate this existing account to edit as needed.



The form is titled "Organization Roster" and features a "Prefix" dropdown menu. At the bottom left, there are "Save" and "Cancel" buttons. The form is divided into two main sections: a top section for the roster and a bottom section for the prefix and action buttons.

- If the record displayed in the **Accounts Found** section is NOT the same employee but shows the message of **Email is already in use**, this would indicate a reused email address within your organization.
 - In this case, you will need to contact ICBA. A new account cannot be created using an email address that already exists in the system. ICBA staff will update the system to free up the email so it can be reassigned to your new hire without carrying over any prior employee information. Contact ICBA at 1-800-422-7285 or email info@icba.org for assistance.

3.7 Removing an Employee

There are three important things to note prior to removing an employee from your bank's roster.

1. Please do not remove employees unless they are no longer with the organization, as they may be enrolled in other important ICBA programs.

2. If an employee changes bank locations/branch, do not remove the employee, but edit their profile. See [Editing an Employee's Account](#) instructions on the next page.
3. Before removing an employee from the bank's roster, if you have online training subscriptions with ICBA, you must pull an Activity Report from the LMS as removing an employee from your bank's roster also removes them and their training history from the LMS.

Note: "Deleting" an account only removes them from your bank list of employees. Deleting and recreating an account will result in a duplicate record for the same individual.

After following the important steps above, proceed with the following procedures to remove an employee:

1. Go to www.icba.org
2. Click **Login** in the upper right corner
3. Enter the email and password for your ICBA account
4. Click your name in the upper right corner and select **My Account**
 - This will open your account page in a new window.
5. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters**
 - Or click the **Manage All Rosters** link found towards the top of the page in the **My Account Links** box

6. From this screen you can filter and sort the report in several ways to find the employee you want to remove or simply navigate through each page until you find the individual. You can also choose from any of the dropdowns at the top of the screen and/or click the **Filter**

button and/or click on any of the column headers within the **Organization Roster** section to sort on that column by alphabetical order.

7. When you find the employee, click the **Remove** button
8. A confirmation box will appear to ensure you want to remove this employee. Click **“Yes, remove employee”** or **“No”** depending on what you would like to complete

Delete ✕

The option to "Remove" an employee is to be used ONLY when an individual is no longer associated with your organization. This option DOES NOT delete their icba.org account as the account remains with the individual as they may continue to use the account in the future.

If you Remove an account and then Create a new account for the same individual, you will be creating a duplicate account which will cause access issues for the individual. If you are having issues with an individuals account, please contact ICBA at 800-422-7285 or info@icba.org.

Are you sure you want to remove this individual from your organization?

Yes, remove employee No

Note: The removal of an employee does not occur immediately within the LMS if you use any of our Online Training education subscriptions. The employee will be removed during the LMS weekly update process that occurs each Friday night.

3.8 Editing an Employee's Account

1. Go to www.icba.org
2. Click **Login** in the upper right corner
3. Enter the email and password for your ICBA account
4. Click your name in the upper right corner and select **My Account**
 - This will open your account page in a new window.
5. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters**
 - Or click the **Manage All Rosters** link found towards the top of the page in the **My Account Links** box

 Organizations You Manage ▼		How to Manage Roster ?		Manage All Rosters
ABC Bank Branch Test PO Box 267 TEST Sauk Centre, MN 56378 UNITED STATES	Bank Branch	C-Level	Edit Org	Manage Roster


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[My Professional Development Planner](#)

[Compliance Vault](#)

[Manage All Rosters](#)

[Change My Password](#)

6. From this screen you can filter and sort the report in several ways to find the employee you want to remove or simply navigate each page until you find the individual. You can also choose from any of the dropdowns at the top of the screen and/or click the **Filter** button and/or click on any of the column headers within the **Organization Roster** section to sort on that column by alphabetical order.

Organization: All
Relation type: All
City: All
State: All
Filter
Reset

Export Roster
Back to My Profile

All contact info added to roster will be primary.


Organization Roster
Add Individual

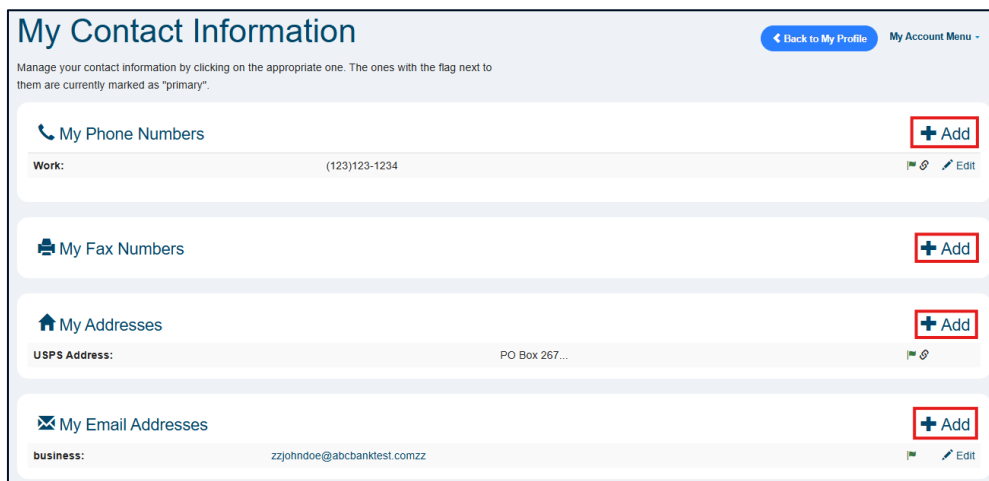
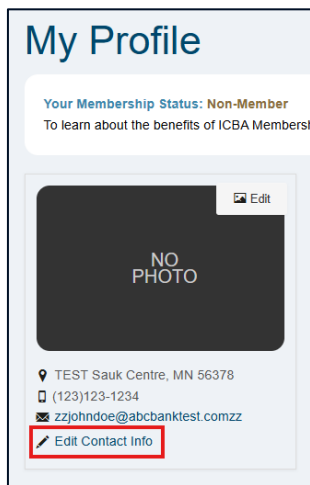
		Prefix	First Name	Last Name	Suffix	Nickname	Email	Title	ICBA Account Permissions	Job Functions
Edit	Remove	Dr.	Anastacia	Simpson		Bella	bellatest@testuser.com	Security	C-Level	security
Edit	Remove	Mr.	Antonio	Ho		Antonio	antonio.ho@icba.org	Vice President, Application De	C-Level	information technology
Edit	Remove	Dr.	Ariel	Simpson		Sirenita	880527@commbanku.com	Lending Assistant	Employee	bank director/board me

7. Once you find the employee you will take one of two options depending on what you want to edit.
- Click the “Edit” button on the left if you want to edit the individual’s:
 - Name
 - Email address
 - Organization/Location
 - Title
 - ICBA Relationship
 - Job Function

- If additional contact information related to an individual listed below needs to be added after the time of account creation and is not already reflected in the contact information linked to the organization, each individual should add it under their own account.
 - Phone
 - Fax
 - Additional Individual Address
 - Additional email addresses

Each individual should proceed with the following procedures to add the additional contact information:

1. Go to www.icba.org
2. Click **Login** in the upper right corner
3. Enter the email and password for your ICBA account
4. Click your name in the upper right corner and select **My Account**
 - This will open your account page in a new window.
5. Under **My Profile** in the upper left, select **Edit Contact Info**



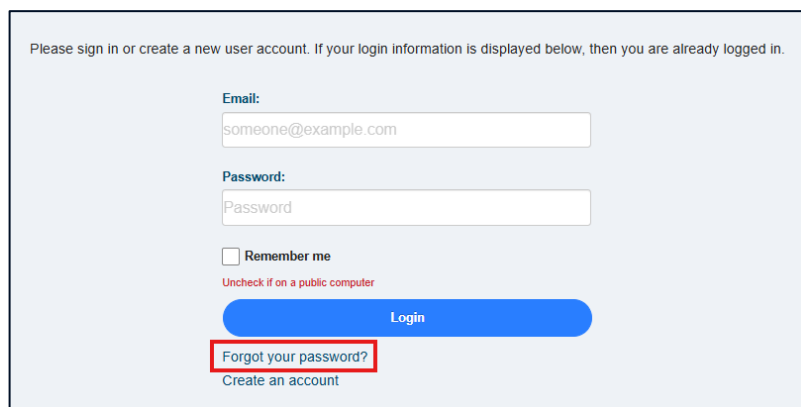
4. Password Resets

There are 3 ways in which an employee's password may be reset if they have forgotten it.

4.1 Employee Resets Their Own Password

An employee may reset their own password to the system if they have a legitimate email address. Have the employee follow these instructions:

1. Go to www.icba.org
2. Click **Login** in the upper right corner
3. Click on the **Forgot your password?** link



Please sign in or create a new user account. If your login information is displayed below, then you are already logged in.

Email:

Password:

☐ Remember me
Uncheck if on a public computer

Forgot your password?
[Create an account](#)

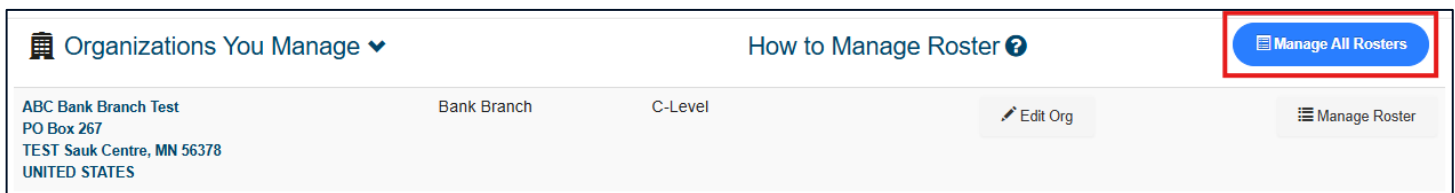
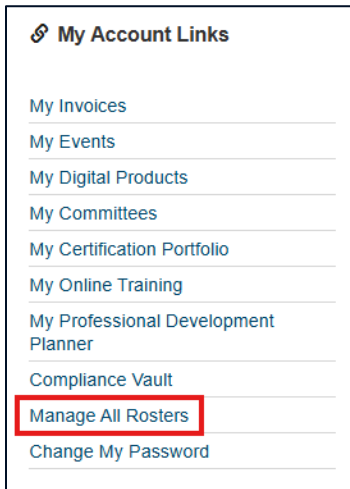
4. Enter your email address and click **Submit**
 - You will receive an email from info@icba.org to the email address entered with instructions to reset the password. The link is valid 24 hours from the time of receipt.
 - If you did not receive the email, please check your spam or quarantine. Also, ask your IT department to whitelist the following to receive emails:
 - IP addresses (3.210.190.250 and 54.174.60.230),
 - domain icba.org, and 5005401m.icba.org, and 5005401t.icba.org,
 - main email address info@icba.org

Note: Whitelisting ICBA's email domain does not affect your bank's email security or deactivate your spam filter.

4.2 Bank Admin Resets Employees Password

An employee designated with the needed authority may also reset a password. Anyone set up as a Middle Manager or C-Level in our system can reset an employee's password for their organization within the ICBA website. Follow these instructions:

1. Go to www.icba.org
2. Click **Login** in the upper right corner
3. Enter the email and password for your ICBA account
4. Click your name in the upper right corner and select **My Account**
 - This will open your account page in a new window.
5. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters**
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6. From this screen you can filter and sort the report in several ways to find the employee you want to remove or simply navigate each page until you find the individual. You can also choose from any of the dropdowns at the top of the screen and/or click the **Filter** button and/or click on any of the column headers within the **Organization Roster** section to sort on that column by alphabetical order.

Organization: All Relation type: All City: All State: All **Filter** **Reset**

Export Roster **Back to My Profile**

All contact info added to roster will be primary.

Organization Roster + Add Individual

	Prefi	First Name	Last Name	Suffix	Nickname	Email	Title	ICBA Account Permissions	Job Functions
Edit Remove	Dr.	Anastacia	Simpson		Bella	bellatest@testuser.com	Security	C-Level	security
Edit Remove	Mr.	Antonio	Ho		Antonio	antonio.ho@icba.org	Vice President, Application De	C-Level	information technology
Edit Remove	Dr.	Ariel	Simpson		Sirenita	880527@commbanku.com	Lending Assistant	Employee	bank director/board me

- Once you find the employee, click the **Edit** button on the left side of the screen next to the individual.
- Tab or scroll to the right and click to type in a value in the **New Password** field.
- Enter in a new password and enter it again in the **Confirm Password** field.
- Click the **Save** button on the left side.

Organization Roster + Add Individual

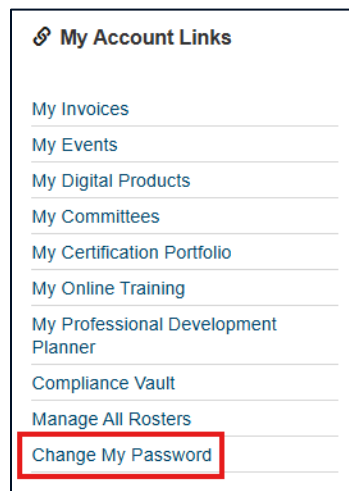
	Email	New Password	Confirm Password	Title	ICBA Account Permissions	Job Functions
Save Cancel	zzbugsbunny@abcbanktest.com	*****	*****	Internal Auditor	Employee	compliance

- The employee will receive an email from info@icba.org stating that their password has been changed.

Note: The employee will not be prompted to change their password upon log in once you have reset it. Please advise them to change their password to something only they know once they've logged in.

Provide the employee with the following instructions:

- Go to www.icba.org
- Click **Login** in the upper right corner
- Enter the email and password for your ICBA account
- Click your name in the upper right corner and select **My Account**
 - This will open your account page in a new window.
- Click **Change My Password** found at the bottom of the list in the **My Account Links** box



- Enter your new password twice and click the **Save** button
- You will receive an email from info@icba.org stating that your password has been changed (if you have a legitimate email address)

Note: Employees who do not have a legitimate email address, may change their email address this same way. They just cannot reset their password on their own if they have forgotten it.

4.3 ICBA Team Member Resets Password

You can contact an ICBA team member at info@icba.org or call 1-800-422-7285 to have the password reset.

If an ICBA team member resets a user's password, they will receive an email that their password has been reset (if a legitimate email is on file) and will be prompted to set a new unique password when they log in for the first time.

5. Managing Your Organization

The following instructions are to be followed if you have a C-Level or Middle Manager relationship type and need to edit a head office or branch location's information.

Note: Relocating a head office or adding a new organization—whether due to a merger or otherwise—can be complex. The same goes for removing a branch. Please contact ICBA for assistance with any organizational changes related to mergers and acquisitions or when adding a new branch location.

Contact info@icba.org or 1-800-422-7285 for assistance.

5.1 Adding a New Organization/Branch

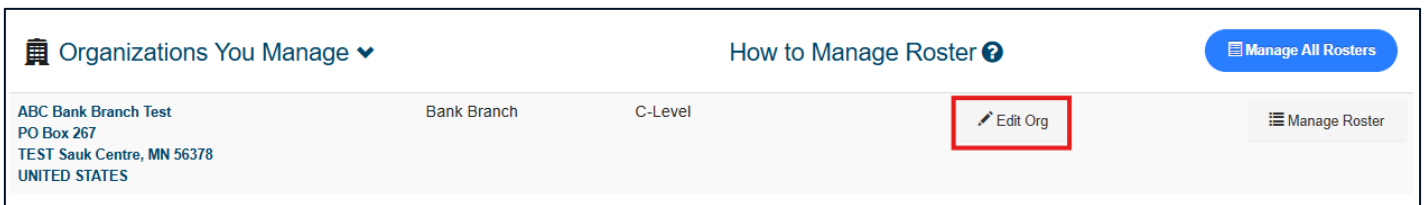
Please contact info@icba.org or 1-800-422-7285 for assistance.

5.2 Removing an Organization/Branch

Please contact info@icba.org or 1-800-422-7285 for assistance.

5.3 Editing an Organization/Branch

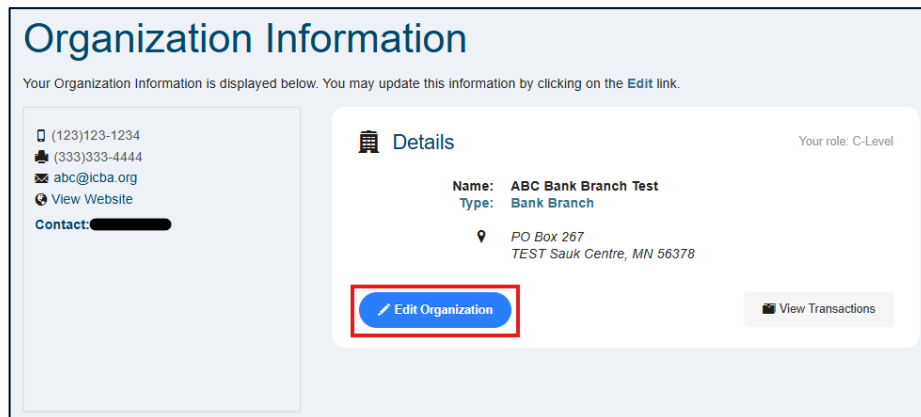
1. Go to www.icba.org
2. Click **Login** in the upper right corner
3. Enter the email and password for your ICBA account
4. Click your name in the upper right corner and select **My Account**
 - This will open your account page in a new window.
5. Scroll down to the **Organizations You Manage** box and click the **Edit Org** button next to the specific branch or head office



The screenshot shows the 'Organizations You Manage' section. At the top, there is a header with 'Organizations You Manage' and a dropdown arrow, 'How to Manage Roster' with a question mark, and a 'Manage All Rosters' button. Below this is a table with the following data:

Organization Name	Type	Level	Action
ABC Bank Branch Test PO Box 267 TEST Sauk Centre, MN 56378 UNITED STATES	Bank Branch	C-Level	Edit Org

6. Click the **Edit Organization** button in the **Details** box



The screenshot shows the 'Organization Information' page. On the left, there is contact information: (123)123-1234, (333)333-4444, abc@icba.org, and a 'View Website' link. Below this is a 'Contact:' field with a redacted name. On the right, there is a 'Details' box. The 'Details' box contains the following information:

Name: ABC Bank Branch Test
Type: Bank Branch
PO Box 267
TEST Sauk Centre, MN 56378

Below the details, there is an 'Edit Organization' button (highlighted with a red box) and a 'View Transactions' button. The user's role is listed as 'C-Level'.

7. Edit the necessary fields and click the **Save** button at the bottom of the screen

Contact Information

Phone number:

1231231234

Fax number:

333-333-4444

Email:

abc@icba.org

Website URL:

http://abc-icba.org

Primary contact:

Please select

Primary Contact Title:

Address Information

Primary Address:

USPS Address: PO Box 267 TE

ICBPAC Prior Approval

As dictated by Federal Election Laws, members of the Independent Community Bankers of America® need to sign a prior approval form in order for executive or administrative personnel to be solicited by ICBPAC. Any bank representative with whom ICBA regularly conducts business can provide their signature on this Prior Approval Form. Approval may be provided for up to five years at a time. By signing the ICBPAC Prior Approval form, the company may not give approval to any other trade association federal PAC for these years.

I hereby authorize ICBPAC to solicit voluntary contributions from the executives, administrative personnel and directors of my company/bank for the following years. Please note that ICBPAC will not directly contact or solicit your employees or directors without your additional written consent.

☐ 2026
☐ 2027
☐ 2028
☐ 2029
☐ 2030

Cancel

Save

5.4 Editing Organization Information

- Go to www.icba.org
- Click **Login** in the upper right corner
- Enter the email and password for your ICBA account
- Click your name in the upper right corner and select **My Account**
 - This will open your account page in a new window.
- Scroll down to the **Organizations You Manage** box and click the **Edit Org** button next to the **Bank Head Office** record. Please note that this demographic information is only stored on the Bank Head Office record.

Organizations You Manage		How to Manage Roster		Manage All Rosters
ABC Bank Branch Test PO Box 267 TEST Sauk Centre, MN 56378 UNITED STATES	Bank Branch	Edit Org	Manage Roster	
ABC Bank Test 123 Main Street Anytown USA, MN 56352 UNITED STATES	Bank Head Office	Edit Org	Manage Roster	

6. Click the **Edit Organization** button in the **Details** box

Organization Information

Your Organization Information is displayed below. You may update this information by clicking on the [Edit](#) link.

(555)555-5555

██████████

██████████

Details

Your role: Employee

Name: ABC Bank Test
Type: Bank Head Office

123 Main Street
Anytown USA, MN 56352

[Edit Organization](#) [View Transactions](#)

7. Edit the necessary fields and click the **Save** button at the bottom of the screen

Edit Your Organization

Organization Information

Organization:
Required

Year Institution Established:

Number of Directors:

Family Owned/Closely Held Bank? ☐

Farmer Mac Participant? ☐

Fiduciary Power? ☐

ABA Member? ☐

State ABA Member? ☐

Number of DDA Accounts:

Number of Savings Accounts: