



# Organization Profile Guide

ICBA’s online resources are accessible by creating and logging onto ICBA’s website [www.icba.org](http://www.icba.org).

Individuals can manage their own profile, but only C-level or middle manager employees can edit the organization’s profile and manage associated employee profiles.

This guide was developed to assist C-level and middle manager contacts with editing and maintaining the organization’s profile and covers:

## Contents

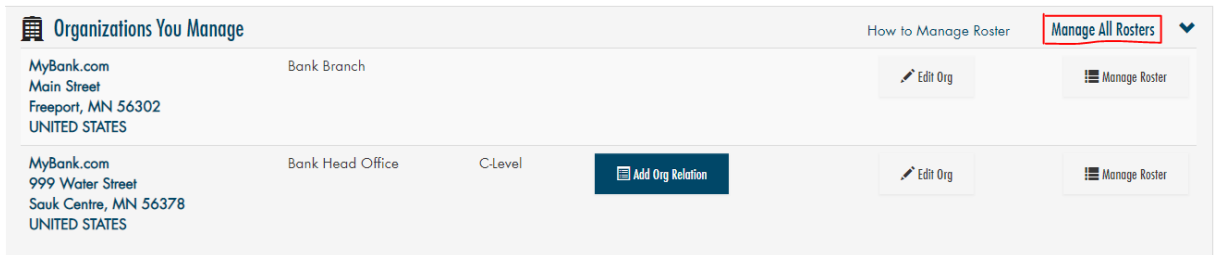
Employee Roster Management .....	2
Add a New Employee .....	3
Option 1: Employee-created account: .....	3
Option 2: Middle Manager/C-Level Relationship created accounts:.....	3
Know the Profile Fields .....	6
Removing an Employee .....	8
Editing an Employee’s Account.....	9
Reset Password .....	11
Option 1: Employees Reset Their Own Password – Preferred.....	11
Option 2: Middle Managers or C-Level staff Reset Employee’s Password.....	11
Option 3: ICBA Team Members Reset Password .....	13
Managing the Organization .....	14
Edit an Organization.....	14
Add a New Branch.....	15

# Employee Roster Management

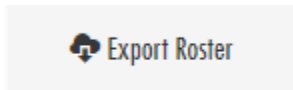
Before adding, editing or deleting an individual review your organization's current employee roster to determine if an individual profile already exists, and his/her location, among other details.

To export your roster, follow these steps:

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**.

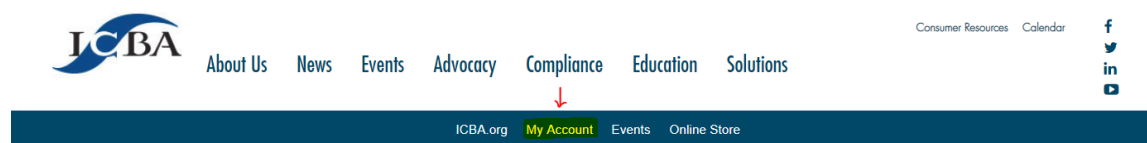


4. In the upper right, click the **Export Roster** button.



5. Your organization's roster will export as an Excel document. Use this document to determine who is missing, needs to be edited, or removed.

If, at any time, you need to get back to your **Organization You Manage** or **My Profile** screen, click the **My Account** link in the blue bar under the ICBA navigator.



# Add a New Employee

There are two ways employees can be added to the roster:

1. Have the employee set up his or her own account using their issued email address (preferred).
2. An employee designated with a **Middle Manager or C-Level ICBA Relationship** in the system may also add the new employee to the organization's roster.

## Option 1: Employee-created account:

1. Visit [www.icba.org](http://www.icba.org) and login on the upper right corner using your email and password.
2. Click on **Create an Account** in the login box.
3. Enter your email address, a password, and click continue.
4. An email will be sent to the email address provided with instructions on completing the account setup. Two things to note regarding the email and continued account setup:
  - a. *To receive appropriate access rights and ICBA benefits, make sure that you select an organization from the dropdown list of existing organizations.*
  - b. *The link is valid for 24 hours from the time of receipt and can only be clicked on once.*

The email will come from [info@icba.org](mailto:info@icba.org). If you fail to receive an email, please check your spam or quarantine folder and ask your IT department to whitelist the following to ensure receipt of future ICBA emails:

- IP addresses (205.201.42.27 and 205.201.40.208)
- domain icba.org, and
- main email address [info@icba.org](mailto:info@icba.org)

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

## Option 2: Middle Manager/C-Level Relationship created accounts:

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](mailto: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 next section, **Know the Profile Fields** 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:

Accounts Found:							
<a href="#">Edit This Individual</a>	414517	Johnson, Cindy					Darwin, MN
<a href="#">Edit This Individual</a>	599064	Jensen, Cindy					,
<a href="#">Edit This Individual</a>	322738	Jensen, Cindy		First Farmers & Merchants State Bank			Austin, MN

[Click here to add the individual anyway](#)

If you need further assistance, please contact ICBA at 800.422.7285.

Duplicate records found.

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	No Email Available	New Password	
<a href="#">Save</a> <a href="#">Cancel</a>	Ms.	Cynthia	Johnson		Cindy	zzcjohnson@mybank.comzz	<input type="checkbox"/>		

- 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.)*

# Know the Profile Fields

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](http://www.icba.org). If the employee has a individual email, enter the email address. *Note: Everyone must have a unique email address.* If the employee does not have a legitimate email, leave the field blank and check the box **No Email Available**. A fictitious email address will be generated once the account is created ([xxxxxx@commbanku.com](mailto:xxxxxx@commbanku.com)). Share this computer-generated email address with the new employee to give them access.
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](mailto: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](mailto: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.
10. **ICBA Relationship** – This field determines the employee’s permissions in editing the organization’s roster and is required. Choose one of the following from the dropdown menu:
- a. *Employee* – Can manage his/her own account and no others.
  - b. *Middle manager* – Can manage individuals only at his/her associated location.
  - c. *C-Level staff*– Can manage individuals at any location or head office location as well as manage organization locations and demographics. LMS Administrators (Community Banker University’s online training system administrators) must be C-level.
11. **Job Functions** – This field is used to capture an employee’s role within the organization. You may start typing a job function and the available fields will appear from which to choose, or you can click in the field with your mouse and the entire list will appear for you to choose from. 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	Address Type	Adr line 1	City	State	Zip	Phone	Fax
<input type="text"/>	<input type="text" value="USPS Address"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

12. **Organization** – From the dropdown list, select the location for which the new employee is associated. The address information will pre-fill once an **Organization** is selected.

# Removing 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. See Editing an Employees Account instructions on the next page.

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 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	
	Mr.	John	Adams		John	zzja@mybank.comzz	Branch Manager	C-Level		MyBank.com	
	Mr.	Jason	Anderson		Jason	zzjj@mybank.comzz	Vice President	Employee		MyBank.com	
	Ms.	Marquitta	Gonzalez		Marquita	783821@commbanku.com	Cashier	Employee		MyBank.com	
	Ms.	Anna	Lincoln		Anna	783816@commbanku.com	Teller	Employee		MyBank.com	
	Mr.	John	Smith		John	zzjs@mybank.comzz	President	C-Level		MyBank.com	
	Ms.	Cheryl	Tennas		Cheryl	783817@commbanku.com	Customer Service Repres	Employee		MyBank.com	
	Ms.	Lakelyn	Tennix		Lakelyn	zzlt@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**.



# Editing an Employee's Account

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. You may click on **Manage Roster** next to the specific branch that the employee is located at or if you are not sure which location, you can click on **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. Once you find the employee you can either:
  - a. Option 1: Click the **Edit** button on the left if you want to edit the following:
    - i. Name
    - ii. Email address
    - iii. Reset password

- iv. Title
- v. ICBA Relationship
- vi. Job function
- vii. Organization/Location

- b. Option 2: Click the **Manage all contact info** button found by scrolling all the way to the right, if you want to add or edit the individuals contact information such as:
    - i. Phone
    - ii. Fax
    - iii. Additional individual address
    - iv. Additional email addresses
6. Edit all applicable fields.
7. Once all changes are complete, click the **Save** or **Close** button depending on what screen you are editing.

# Reset Password

There are three ways to reset a forgotten login password.

## Option 1: Employees Reset Their Own Password – Preferred

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

1. Go to [www.icba.org](http://www.icba.org)
2. Click on **Member Login** in the upper right.
3. Click on the **Forgot your password?** Link.
4. Enter your email address and click **Submit**.
5. An email will be sent with instructions to reset the password. **Note: The link is valid for 24 hours from the time of receipt and can only be clicked on once.**

The email will come from [info@icba.org](mailto:info@icba.org). Please check your spam or quarantine folder if it is not delivered to your inbox and ask your IT department to whitelist the following to receive emails:

- IP addresses (205.201.42.27 and 205.201.40.208),
- domain icba.org,
- main email address [info@icba.org](mailto:info@icba.org)

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

## Option 2: Middle Managers or C-Level staff Reset Employee's Password

An employee with a Middle Manager or C-Level "ICBA Relationship" status can reset an employee's password within the ICBA website by following these instructions:

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. You may click on **Manage Roster** next to the specific branch where the employee is located. If you are unsure of the location, you can click on **Manage All Rosters**.

4. From this screen you can filter and sort the report in several ways to find the employee you want to reset 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 the **Filter** button or you can click on any of the column headers within the **Organization Roster** to sort.

	Prefix	First Name	Last Name	Suffix	Nickname	Email	Title	ICBA Relationship	Job Functions	Organization
(E)	Mr.	John	Adams		John	zzjo@mybank.comzz	Branch Manager	C-Level		MyBank.com
(E)	Mr.	Jason	Anderson		Jason	zzj@mybank.comzz	Vice President	Employee		MyBank.com
(E)	Ms.	Marquita	Gonzalez		Marquita	783821@commbanku.com	Cashier	Employee	contact contact contact	MyBank.com
(E)	Ms.	Anna	Lincoln		Anna	783816@commbanku.com	Teller	Employee		MyBank.com
(E)	Mr.	John	Smith		John	zzj@mybank.comzz	President	C-Level		MyBank.com
(E)	Ms.	Cheryl	Tennas		Cheryl	783817@commbanku.com	Customer Service Repres	Employee		MyBank.com
(E)	Ms.	Lakelyn	Tennix		Lakelyn	zzlf@mybank.comzz	Teller	Employee		MyBank.com

5. Once you find the employee, click the **Edit** button on the left side of the screen next to the individual.
6. Tab or scroll and click to the **New Password** field.
7. Enter a new password and enter it again in the **Confirm Password** field.
8. Click the **Save** button on the left side.
9. If the employee has a legitimate email address, an email will be sent to the employee from [info@icba.org](mailto:info@icba.org) stating their password has been changed.

**Please Note:** Employees will not be prompted to change their password upon login once you have reset it. We recommend you have them change their password to something only they know once they've logged in. Provide employees with the following instructions:

1. Go to [www.icba.org](http://www.icba.org) and click on **Member Login** in the upper right corner.
2. Enter your email and the password provided to you and click the **Login** button.
3. Click on **My Account** in the upper right corner.
4. 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.
5. Enter your new password twice and click the **Save** button.
6. You will receive an email from [info@icba.org](mailto:info@icba.org) stating that your password has been changed (if you have a legitimate email address).

Employees without a legitimate email address, may change their email address this same way. However, they cannot reset their password on their own if they have forgotten it.

### Option 3: ICBA Team Members Reset Password

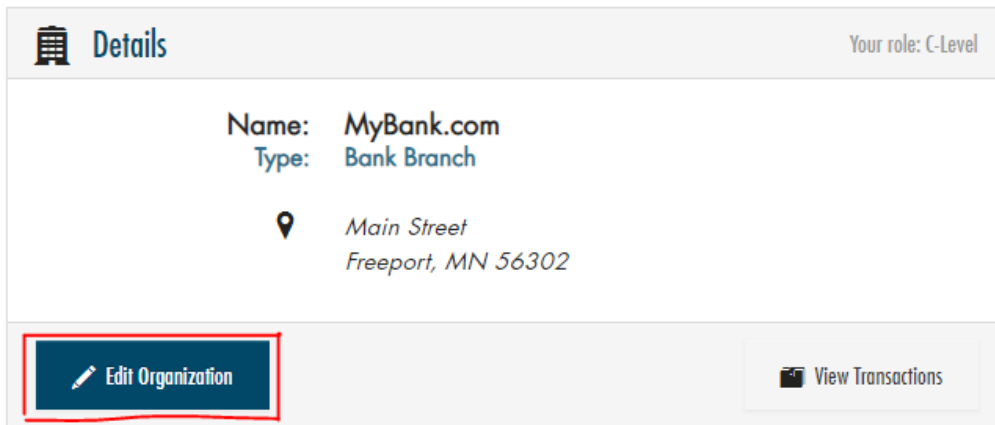
You can contact an ICBA team member at [info@icba.org](mailto:info@icba.org) or 1-800-422-7285 to have the password reset. If ICBA resets a user's password, the employee will receive an email notifying them that his/her password has been reset (if a legitimate email is on file).

# Managing the Organization

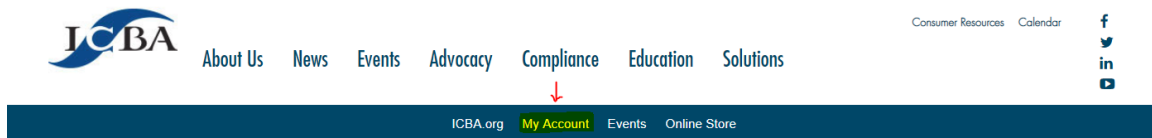
## Edit an Organization

If you are a **C-Level ICBA Relationship** and need to edit the head office or branch locations information:

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** and click the **Edit Org** button next to the specific branch or head office.
4. Click the **Edit Organization** button in the Details box.



5. Edit the necessary fields and click the **Save** button at the bottom.
6. To get back to your **Organization You Manage** or **My Profile** screen, click the **My Account** link in the blue bar under the ICBA website directories.

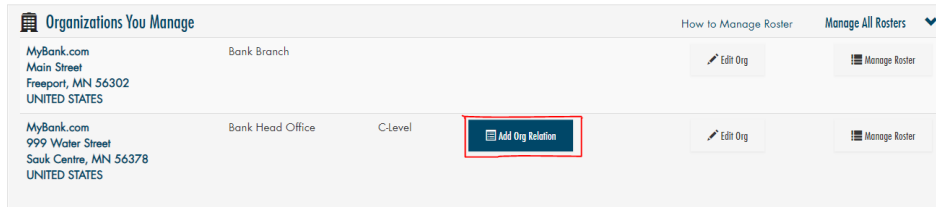


Note: To remove a branch please contact ICBA at [info@icba.org](mailto:info@icba.org) or 1-800-422-7285.

## Add a New Branch

If you are a **C-Level ICBA Relationship** and need to add a new branch to your organization:

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 on the **Add Org Relation** button found next to the Head Office.



4. Enter in, at a minimum, the **Organization Name**, on the **Search** screen for the system to search to find potential duplicate organizations. The more information you enter the smaller the search results.

The screenshot shows a search form with the following fields: "Acronym:" (empty), "Organization Name:" (filled with "My Bank"), "Organization Type:" (empty), "City:" (empty), and "State/Territory:" (dropdown menu with "Please select"). A blue "Search" button is located at the bottom of the form.

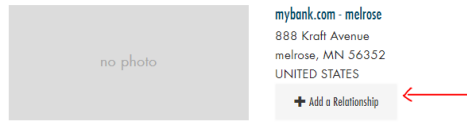
- a. If no organizations are found, click **Add an Organization**.

Organization Directory Search Result  
◀ back to search

No organizations matched your search criteria. Please try again, or [Add an Organization](#)

- b. If a similar organization is found and it is a location that you want to link to your organization, click the **+Add a Relationship** button.

Organizations matching your search criteria are listed below. If the organization you are searching for is not below, please try again, or Add an Organization



The screenshot shows a search result for 'mybank.com - melrose'. On the left is a grey box with the text 'no photo'. To the right, the organization name 'mybank.com - melrose' is displayed in blue. Below it, the address '888 Kraft Avenue, melrose, MN 56352, UNITED STATES' is listed. At the bottom right of the card is a button labeled '+ Add a Relationship' with a red arrow pointing to it from the right.

5. Complete all fields with information on the new branch on the **Add Organization Relation** screen and click the **Continue** button.
6. The new branch will now appear in the list of **Organizations You Manage**. You may add employees to this branch as necessary.

*NOTE: Adding a new organization in a merger situation can be tricky due to the timing of the merger and the changing of the organization name. For questions regarding creating a new organization or adding a Relationship, please contact [info@icba.org](mailto:info@icba.org) or 1-800-422-7285 for assistance.*