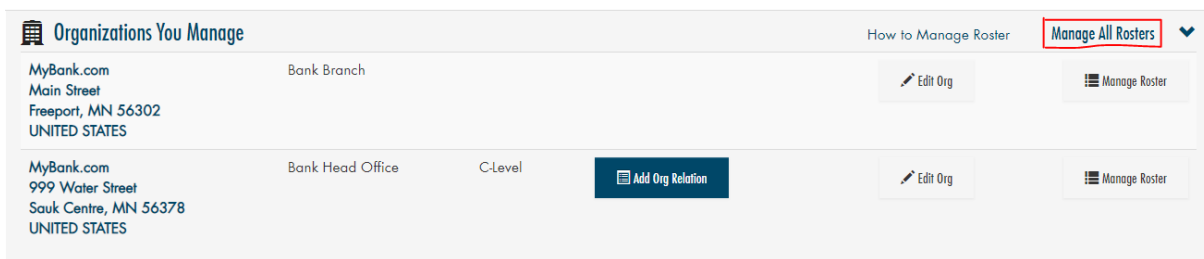


Employee Roster Management

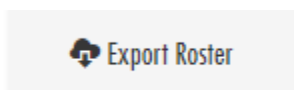
Before adding, editing or deleting an individual, review your organization's current employee roster to determine if an individual profile already exists, and his/her location, among other details.

To export your roster, follow these steps:

1. Visit www.icba.org 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 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. 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

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 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 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:

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.

Accounts Found:		
Edit This Individual	414517	Johnson, Cindy
Edit This Individual	599064	Jensen, Cindy

- 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

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
	☐				Employee	

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 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@commbankku.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 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.
 - 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.
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 can click in the field with your mouse and the entire list will appear for you to choose from, or start typing to jump to a relevant role. Corporate Members should have a single contact for two key roles:
- a. **MemberList Contact** (Select level only) – for receipt of the quarterly ICBA member list of community banks
 - b. **Primary Exhibitor Contact** – for information about ICBA events
- 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
	USPS Address						

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