

CPIM

CENTER FOR PUBLIC INVESTMENT MANAGEMENT



A PROGRAM BROUGHT TO YOU BY:

JOSH MANDEL

STATE TREASURER OF OHIO

MyCPIM

Manual of Instructions

Welcome to MyCPIM.

The goal of MyCPIM is to make finding the right CPIM education, reporting hours, paying fees, downloading certificates, and anything else you need to complete your CPIM requirements each year easier than ever. If you have additional questions not answered in this manual, please contact us.

Need help? Contact us!

(800) 228-1102 | cpim@tos.ohio.gov

**This manual is written so that the reader may print it
and follow along as they learn to navigate MyCPIM.**

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Dark Blue Navigation Bar

- The dark blue navigation bar at the top of the homepage is accessible from every page on the MyCPIM portal, including pages only viewable after logging in. To get back to the MyCPIM homepage, click **CPIM HOME**.

The screenshot shows the MyCPIM homepage. At the top, there is a dark blue navigation bar with the following links: CPIM HOME (circled in red), POLICIES, FAQ, FISCAL OFFICER SEARCH, and USING MYCPIM. Below the navigation bar is a green 'MyCPIM Login' button. The main content area features a 'Welcome to MyCPIM' message and a list of services for users logged in. Below this is a 'Schedule of Events' section with a sub-tab for 'CPIM Academy'. A table lists several events with columns for Event Name, Date, Host, and # of Hours. Each row has a 'View' button.

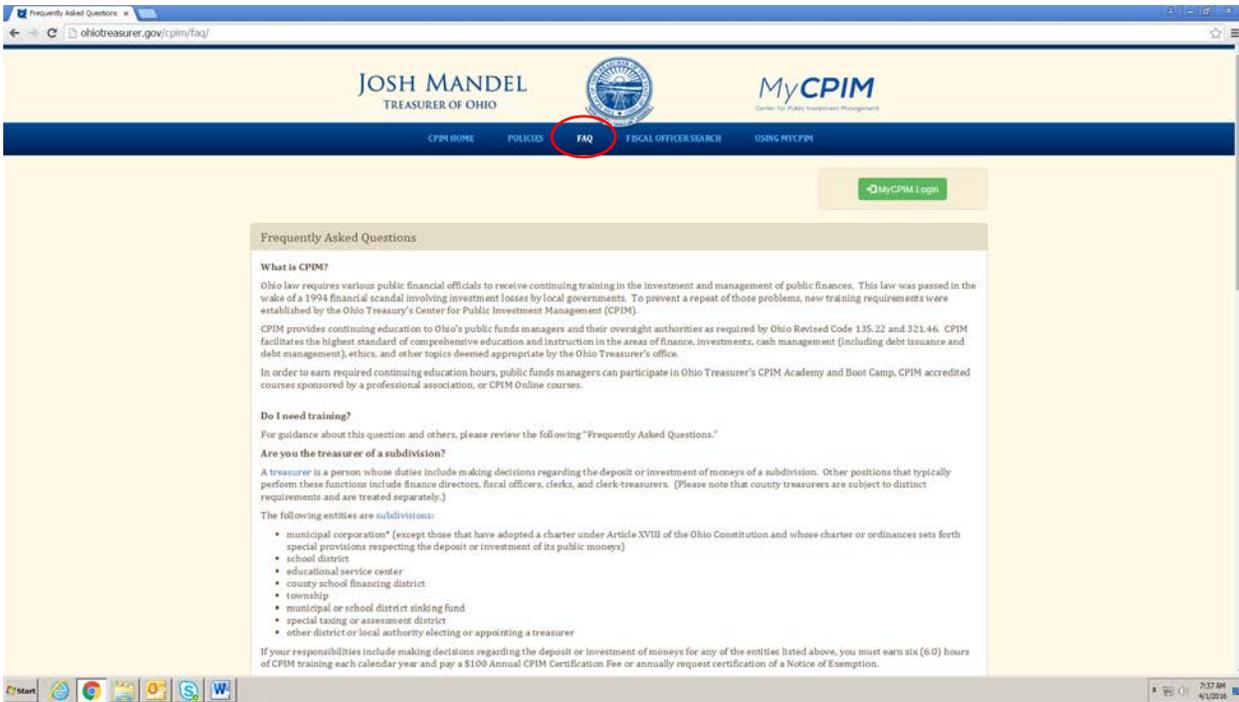
Event Name	Date	Host	# of Hours
Public Library Fiscal Officer Conference	3/31/2016 - 4/1/2016	Ohio Library Council (OLC)	8
West Central OASBO Chapter Meeting	4/8/2016	Ohio Association of School Business Officials (OASBO)	3
OASBO 2016 Annual Workshop	4/12/2016 - 4/15/2016	Ohio Association of School Business Officials (OASBO)	14
Ohio Treasurer's Columbus CPIM Academy	4/13/2016	Treasurer of State (TOS)	17

NOTE: The site works best in Google Chrome or Firefox. Please let us know of any malfunctions you experience using other browsers.

- To review our policies, many of which have changed since we launched this site, click **POLICIES**.

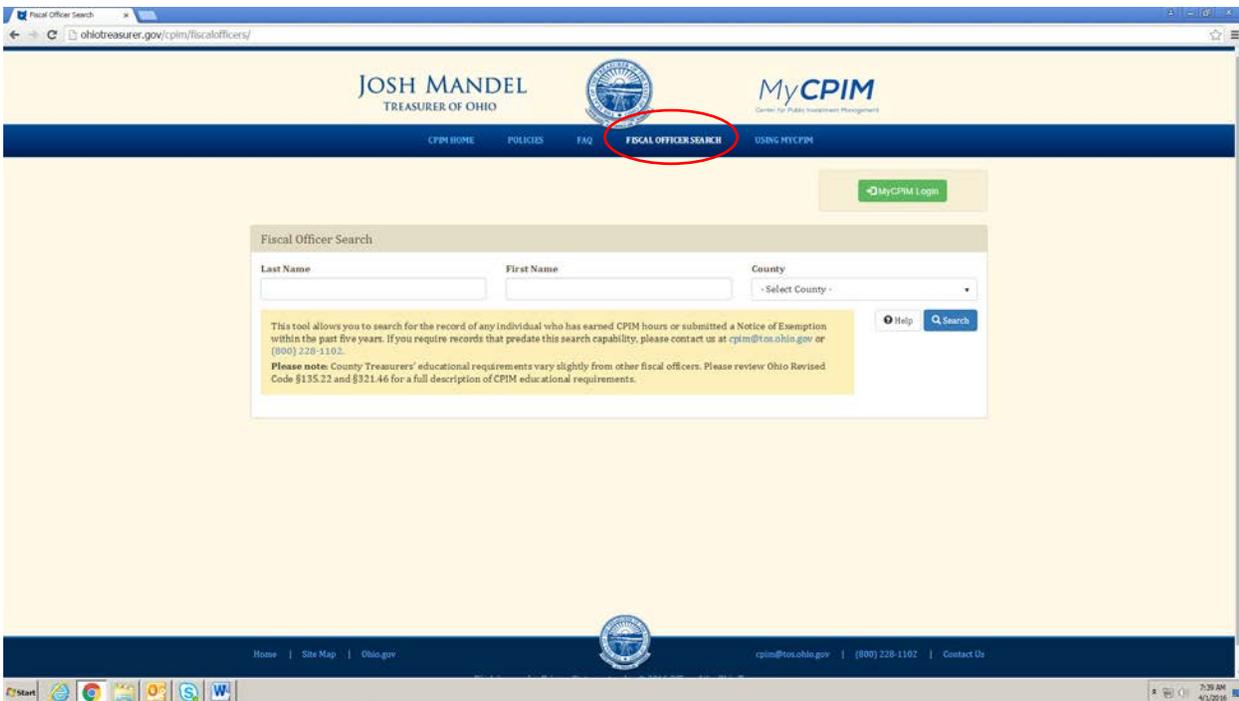
The screenshot shows the MyCPIM Policies page. The navigation bar is the same as the homepage, with 'POLICIES' circled in red. Below the navigation bar is a green 'MyCPIM Login' button. The main content area is titled 'Policies' and contains several sections: Reporting CPIM Hours, Fees, Online Courses, Logging onto MyCPIM, and Exemptions. Each section contains a list of bullet points detailing the policies.

- If you have questions about the CPIM program, they may be answered after clicking **FAQ**.

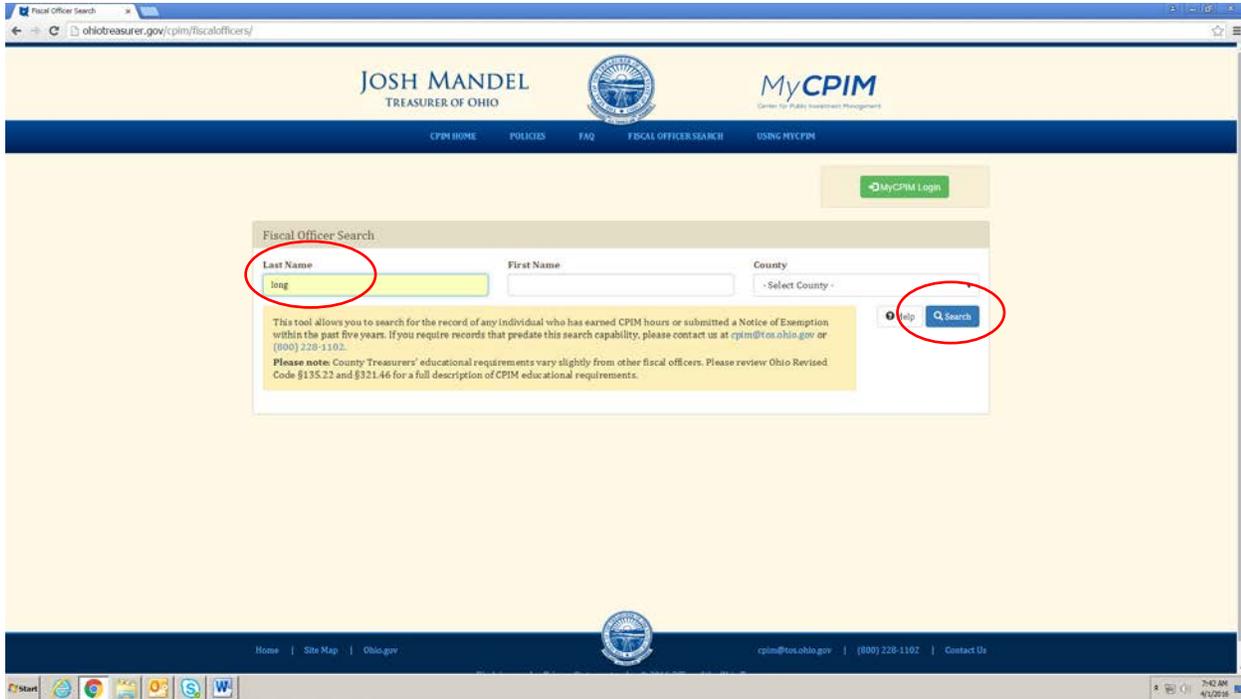


NOTE: If you have questions about how to navigate MyCPIM, they can be found at the end of this manual (COMING SOON!), not on the FAQ page of MyCPIM.

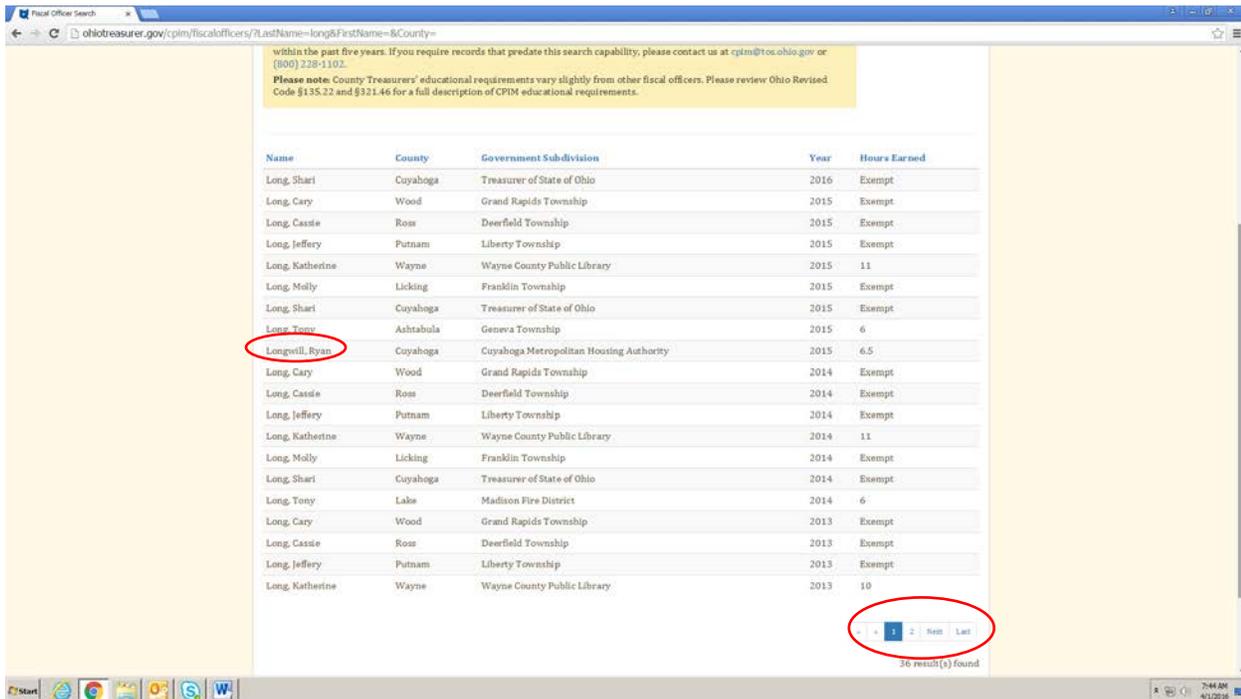
- For quick access to fiscal officer public records, click **FISCAL OFFICER SEARCH**.



- This search tool allows you to be very broad or specific. For example, type *long* into the **Last Name** field and click **Search**.



- It will display any record with *long* in the last name, including *Longwill*. The search results appear in descending year order, up to five calendar years in the past. The participant will be listed once per year they have either earned CPIM hours or have an exemption. For example, you'll see *Cassie Long* on the list a few times since she has filed exemptions for the past few years. If your search brings up more records than can be viewed on one page, you can use the page buttons at the bottom of the list to review all of your results.



- You can find the link to this manual by clicking **USING MYCPIM**.

The screenshot shows the MyCPIM website interface. At the top, the header includes the name 'JOSH MANDEL, TREASURER OF OHIO' and the 'MyCPIM' logo. A navigation bar below the header contains several links: 'CPIM HOME', 'POLICYS', 'FAQ', 'FISCAL OFFICER SEARCH', and 'USING MYCPIM'. The 'USING MYCPIM' link is circled in red. To the right of the navigation bar is a green 'MyCPIM Login' button.

Below the navigation bar, there is a 'Welcome to MyCPIM' section with a brief description of the portal's purpose and a list of user actions:

- Report CPIM hours
- Request certification of a Notice of Exemption
- Pay the Annual CPIM Certification fee via credit card or eCheck/ACH
- Register and view details and materials for the Ohio Treasurer's CPIM Academy & Boot Camp
- Search for CPIM education opportunities
- View and complete CPIM Online courses
- Download a Certificate of Completion once the annual CPIM requirements have been met
- Look up past CPIM history

Below this section is a 'Schedule of Events' table with a tab for 'CPIM Academy':

Event Name	Date	Host	# of Hours
Public Library Fiscal Officer Conference	3/31/2016 - 4/1/2016	Ohio Library Council (OLC)	8
West Central OASBO Chapter Meeting	4/8/2016	Ohio Association of School Business Officials (OASBO)	3
OASBO 2016 Annual Workshop	4/12/2016 - 4/15/2016	Ohio Association of School Business Officials (OASBO)	14
Ohio Treasurer's Columbus CPIM Academy	4/13/2016	Treasurer of State (TOS)	17

Each row in the table has a 'View' button to the right. The browser's taskbar at the bottom shows the time as 7:50 AM on 4/13/2016.

Schedule of Events

- Also on the homepage is a full schedule of upcoming or recently occurred events that feature CPIM accredited courses. The **Schedule of Events** shows the event name, date, host, and total number of CPIM hours offered at the conference.

The screenshot shows the MyCPIM homepage. At the top, there is a navigation bar with links for CPIM HOME, POLICIES, FAQ, FISCAL OFFICER SEARCH, and USING MYCPIM. A green 'MyCPIM Login' button is located in the top right. Below the navigation bar, a 'Welcome to MyCPIM' message is displayed, followed by a list of user actions. The 'Schedule of Events' link is circled in red. Below it, a table lists upcoming events with columns for Event Name, Date, Host, and # of Hours. Each row has a 'View' button next to it.

Event Name	Date	Host	# of Hours
Public Library Fiscal Officer Conference	3/31/2016 - 4/1/2016	Ohio Library Council (OLC)	8
West Central OASBO Chapter Meeting	4/8/2016	Ohio Association of School Business Officials (OASBO)	3
OASBO 2016 Annual Workshop	4/12/2016 - 4/15/2016	Ohio Association of School Business Officials (OASBO)	14
Ohio Treasurer's Columbus CPIM Academy	4/13/2016	Treasurer of State (TOS)	17

NOTE: The total number of CPIM hours displayed includes concurrent courses, so this number may not necessarily reflect the actual number of hours you may earn at the conference, since you may not earn hours for more than one course at a time.

- Click **View** for more event information.

This screenshot is identical to the previous one, but with the 'View' button for the 'Ohio Treasurer's Columbus CPIM Academy' event circled in red.

Event Name	Date	Host	# of Hours
Public Library Fiscal Officer Conference	3/31/2016 - 4/1/2016	Ohio Library Council (OLC)	8
West Central OASBO Chapter Meeting	4/8/2016	Ohio Association of School Business Officials (OASBO)	3
OASBO 2016 Annual Workshop	4/12/2016 - 4/15/2016	Ohio Association of School Business Officials (OASBO)	14
Ohio Treasurer's Columbus CPIM Academy	4/13/2016	Treasurer of State (TOS)	17

- The event details page will show you additional information about the event, including an event description, registration information, an onsite contact, and the individual CPIM courses occurring at the event.

Ohio Treasurer's Columbus CPIM Academy

Our CPIM Academy conferences are designed for local government finance officers with more than two years of experience. (Fiscal officers with less than two years of experience should register for our concurrent CPIM Boot Camp.) The courses are structured to meet the various levels of experience of Ohio's public funds managers as indicated by the course numbering: 100-level classes representing fundamentals, 200-level classes on intermediate topics, and 300-level classes addressing the most advanced of topics. Registration and breakfast begins at 7:30am. Lunch will be from 12:20pm - 1:10pm.

Host Organization: Treasurer of State (TOS)
Event Date: 4/13/2016
of Hours Available: 17
Location: Columbus State Community College Conference Center & Center for Workforce Development, 315 Cleveland Avenue (at Grove Street), Columbus, OH 43215

Conference Website / Registration Contact: cpim@tos.ohio.gov
Event Materials: Parking Pass - coming soon, Driving Directions - coming soon, Event Menu - coming soon, Full Event Schedule & Course Description Quick Guide - coming soon, MyCPIM Worksheet - coming soon
Contact for Dietary Needs, Accessibility, etc.: cpim@tos.ohio.gov
Onsite Contact: Shari Long, CPIM Officer, Ohio Treasurer of State, (440) 596-0824, shari.long@tos.ohio.gov

Course Name	Date/Time	Speaker(s)	Hours Available
General Session and Market Update	4/13/2016 8:30 AM - 9:30 AM	JD Pitsula, Ohio Treasurer of State, Zach Amendolea, CFA, Ohio Treasurer of State	1 View
CASH 237: Collateralized Deposits Update	4/13/2016 9:30 AM - 10:30 AM	Ashley Montgomery, Ohio Treasurer of State, Robin Williams, Ohio Treasurer of State	1 View

NOTE: Registration information may also be found here for the Treasurer of State's CPIM conferences. We will review that information on page xx.

- Click **View** for more course information.

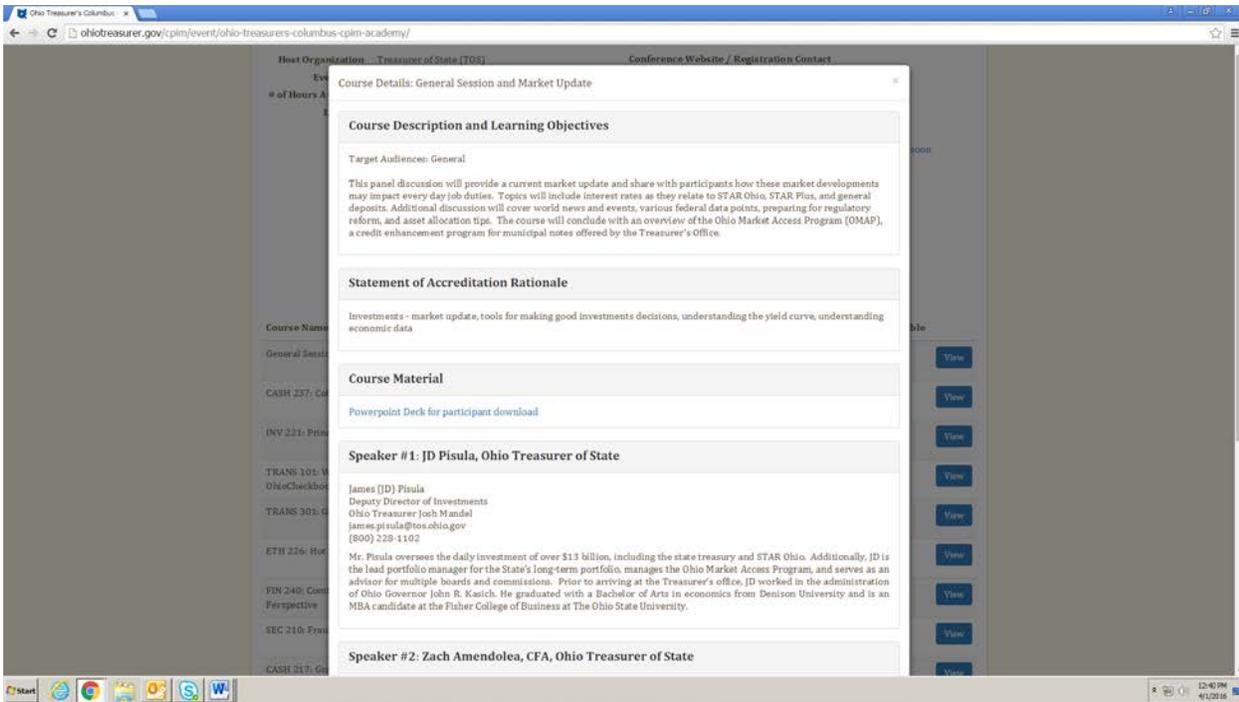
Ohio Treasurer's Columbus CPIM Academy

Host Organization: Treasurer of State (TOS)
Event Date: 4/13/2016
of Hours Available: 17
Location: Columbus State Community College Conference Center & Center for Workforce Development, 315 Cleveland Avenue (at Grove Street), Columbus, OH 43215

Conference Website / Registration Contact: cpim@tos.ohio.gov
Event Materials: Parking Pass - coming soon, Driving Directions - coming soon, Event Menu - coming soon, Full Event Schedule & Course Description Quick Guide - coming soon, MyCPIM Worksheet - coming soon
Contact for Dietary Needs, Accessibility, etc.: cpim@tos.ohio.gov
Onsite Contact: Shari Long, CPIM Officer, Ohio Treasurer of State, (440) 596-0824, shari.long@tos.ohio.gov

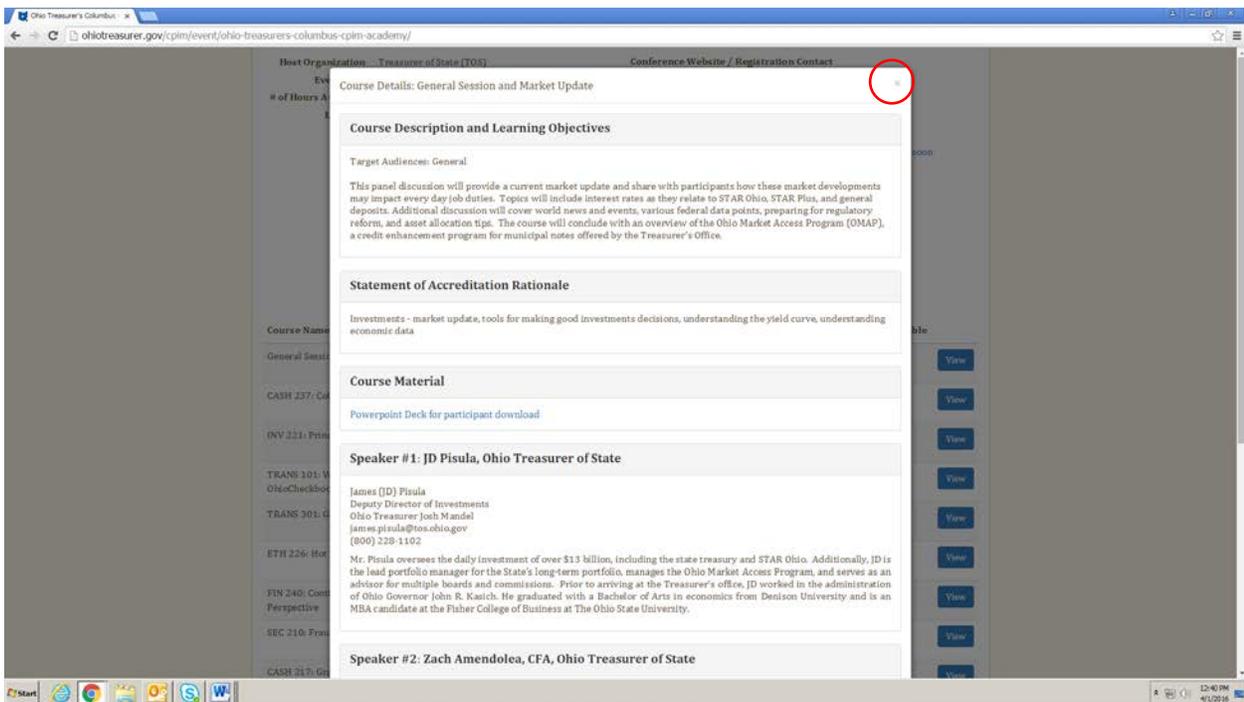
Course Name	Date/Time	Speaker(s)	Hours Available
General Session and Market Update	4/13/2016 8:30 AM - 9:30 AM	JD Pitsula, Ohio Treasurer of State, Zach Amendolea, CFA, Ohio Treasurer of State	1 View
CASH 237: Collateralized Deposits Update	4/13/2016 9:30 AM - 10:30 AM	Ashley Montgomery, Ohio Treasurer of State, Robin Williams, Ohio Treasurer of State	1 View
INV 221: Principles of Investment Accounting	4/13/2016 9:30 AM - 10:30 AM	Dennis Yarobenzel, United American Capital Corporation, Stan Baborek, Columbus City Schools	1 View
TRANS 101: Why Transparency? An Introduction to OhioCheckbook.com for Local Governments	4/13/2016 9:30 AM - 10:30 AM	Frank Kobstall, Ohio Treasurer of State, OpenGov	1 View
TRANS 301: Getting the Most Out of OhioCheckbook.com	4/13/2016 9:30 AM - 10:30 AM	OpenGov	1 View
ETH 226: Hot Topics in Ohio Ethics Law	4/13/2016 10:30 AM - 11:30 AM	Susan Willeke, Ohio Ethics Commission	1 View
FIN 240: Continuing Disclosure from an Underwriter's Perspective	4/13/2016 10:30 AM - 11:30 AM	Katie Kleinfelder, BBC Capital Markets	1 View
SEC 210: Fraud Detection and Prevention	4/13/2016 10:30 AM - 11:30 AM	Don Owens, Schneider Downs & Co., Inc.	1 View
CASH 217: Grants Management and Audit Compliance	4/13/2016 11:30 AM - 12:30 PM	Kelly Berger-Davis, Ohio Auditor of State	1 View

- This will pop up details for each individual course, such as the description and speaker biographies.



NOTE: This is the information that associations are required to submit in order to receive accreditation for each course. This information could be helpful even for events you're already planning to attend, since some organizations don't post any or all of this information on their own sites for their own events.

- To close out of this screen, click x.



Schedule of Events Search

- To search through the entire Schedule of Events, click **Back to Event Search** at the bottom of any event details page.

Ohio Treasurer's Columbus CPIM Academy

Event Name	Date	Host	# of Hours	View
TRANS 301: Getting the Most Out of OhioCheckbook.com	4/13/2016 9:30 AM - 10:30 AM	OpenGov	1	View
ETH 226: Hot Topics in Ohio Ethics Law	4/13/2016 10:30 AM - 11:30 AM	Susan Willeke, Ohio Ethics Commission	1	View
FIN 240: Continuing Disclosure from an Underwriter's Perspective	4/13/2016 10:30 AM - 11:30 AM	Katie Kleinfelder, RBC Capital Markets	1	View
SEC 210: Fraud Detection and Prevention	4/13/2016 10:30 AM - 11:30 AM	Don Owens, Schneider Downs & Co., Inc.	1	View
CASH 217: Grants Management and Audit Compliance	4/13/2016 11:30 AM - 12:30 PM	Kelly Berger-Davis, Ohio Auditor of State	1	View
ETH 226: Hot Topics in Ohio Ethics Law	4/13/2016 11:30 AM - 12:30 PM	Susan Willeke, Ohio Ethics Commission	1	View
INV 301: Best Practices for Investing Public Funds	4/13/2016 11:30 AM - 12:30 PM	Ryan Nelson, Redtree Investment Group, Kirk Ludwig, SJS Investment Services	1	View
FIN 330: Trends in Capital Improvement Refinancing	4/13/2016 11:10 PM - 2:10 PM	Jennifer Blaser, Dinsmore & Shohl, LLP, Patrick King, Stifel Nicolaus	1	View
INV 161: Effective Investment Policies and Investment Statement Analysis	4/13/2016 11:10 PM - 2:10 PM	Ryan Nelson, Redtree Investment Group	1	View
SEC 161: Electronic Banking and Cyber Security	4/13/2016 11:10 PM - 2:10 PM	Dustin Kohlhorst, Ohio Treasurer of State, Stacey Russell, Muskingum County Library System	1	View
Round Table for Governments with Budgets of \$0 - \$10m	4/13/2016 2:10 PM - 3:10 PM	Jessica Dragar, Ohio Treasurer of State	1	View
Round Table for Governments with Budgets of \$25m+	4/13/2016 2:10 PM - 3:10 PM	Jonathan Azoff, Ohio Treasurer of State	1	View
Round Table for Governments with Budgets up to \$10m - \$25m	4/13/2016 2:10 PM - 3:10 PM	Tanya R. Rutner, Ohio Treasurer of State	1	View

[← Back to Event Search](#)

- The event search page can also be accessed at the bottom of the Schedule of Events on the homepage by clicking **See all upcoming events**.

CPIM Dashboard

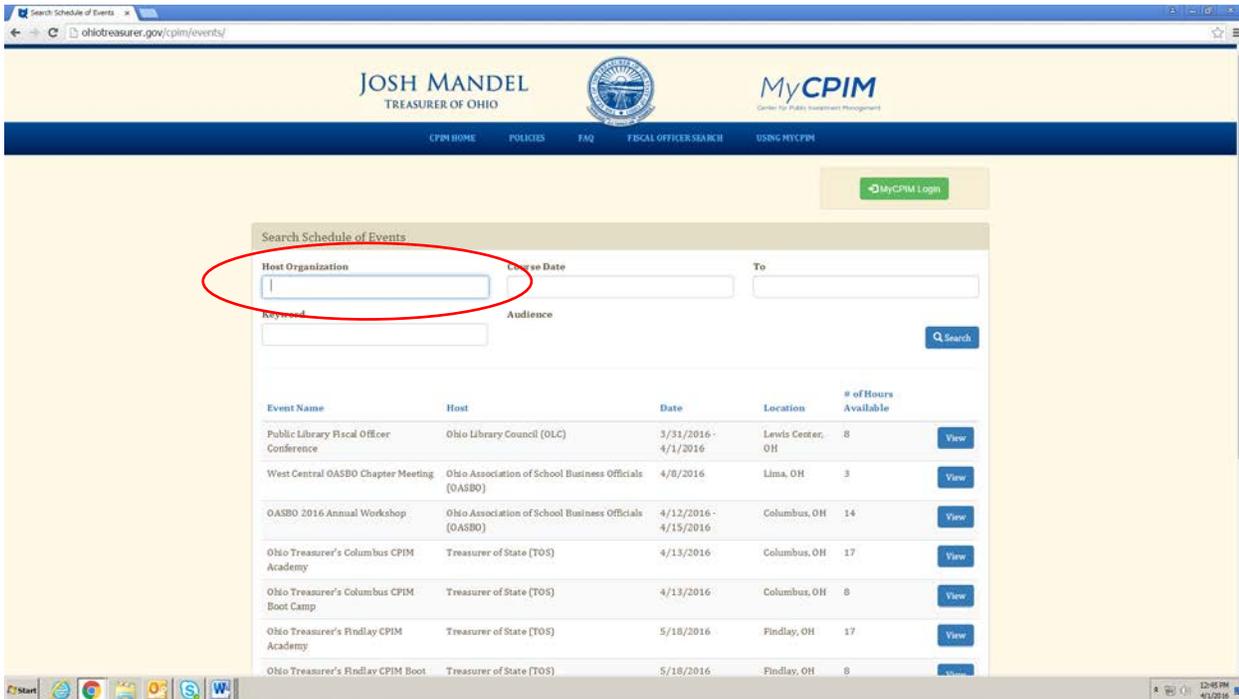
- View and complete CPIM Online courses
- Download a Certificate of Completion once the annual CPIM requirements have been met
- Look up past CPIM history

Schedule of Events CPIM Academy

Event Name	Date	Host	# of Hours	View
Public Library Fiscal Officer Conference	3/31/2016 - 4/1/2016	Ohio Library Council (OLC)	8	View
West Central OASBO Chapter Meeting	4/8/2016	Ohio Association of School Business Officials (OASBO)	3	View
OASBO 2016 Annual Workshop	4/12/2016 - 4/15/2016	Ohio Association of School Business Officials (OASBO)	14	View
Ohio Treasurer's Columbus CPIM Academy	4/13/2016	Treasurer of State (TOS)	17	View
Ohio Treasurer's Columbus CPIM Boot Camp	4/13/2016	Treasurer of State (TOS)	8	View
Ohio Treasurer's Findlay CPIM Academy	5/18/2016	Treasurer of State (TOS)	17	View
Ohio Treasurer's Findlay CPIM Boot Camp	5/18/2016	Treasurer of State (TOS)	8	View
Ohio Treasurer's Cincinnati CPIM Academy	9/14/2016	Treasurer of State (TOS)	17	View
Ohio Treasurer's Cincinnati CPIM Boot Camp	9/14/2016	Treasurer of State (TOS)	8	View
Ohio Treasurer's Cleveland CPIM Academy	10/26/2016	Treasurer of State (TOS)	17	View

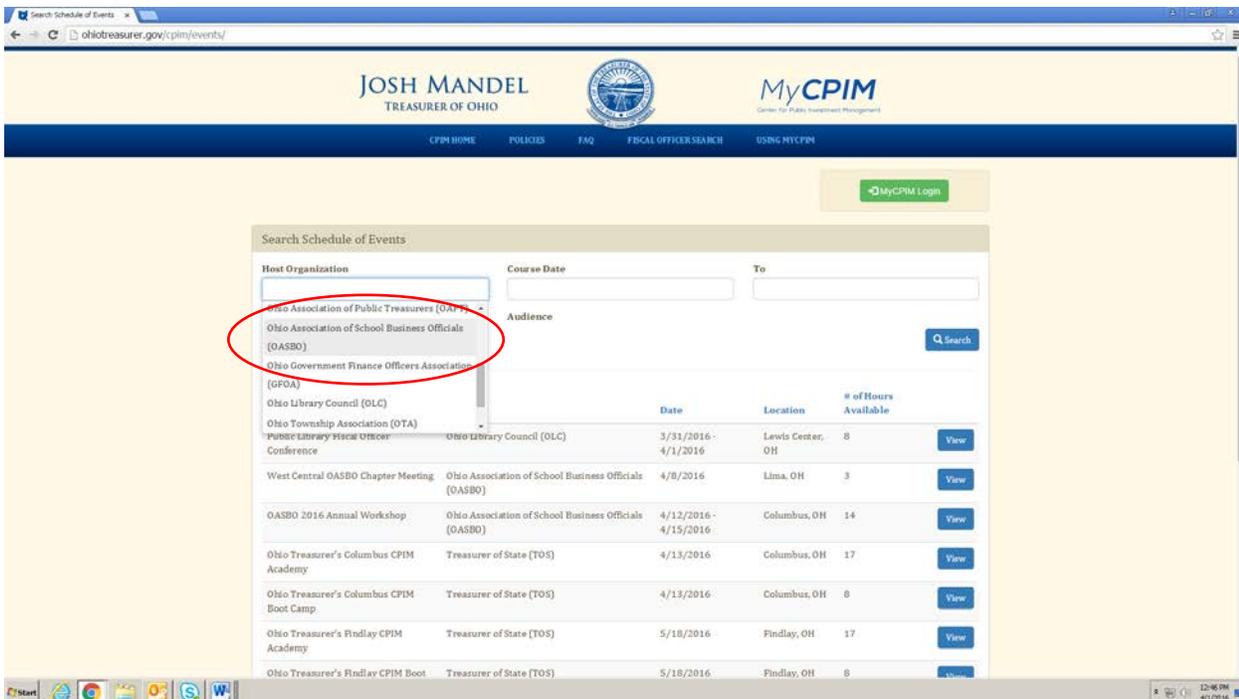
[See all upcoming events](#)

- This tool allows you to search through the Schedule of Events for various descriptors, such as host organization, date, target audience or keywords. For example, to find only OASBO hosted courses, click inside the **Host Organization** field.

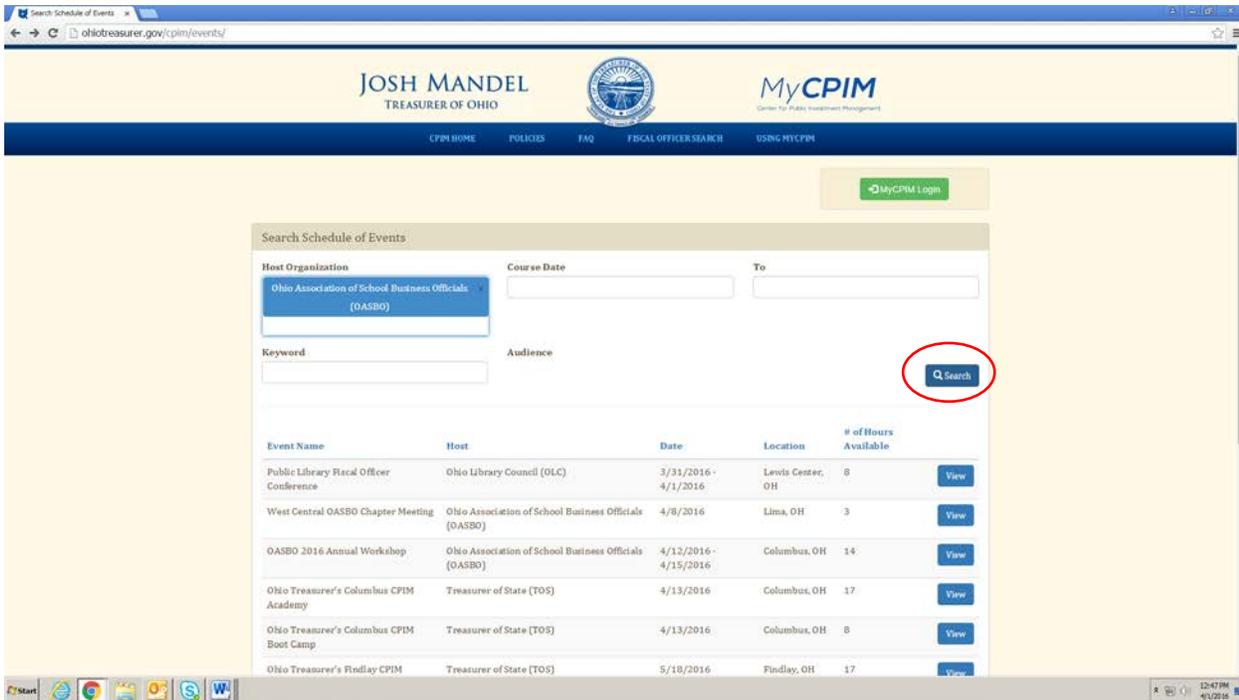


NOTE: One of the goals of MyCPIM is to help you find the most relevant and convenient CPIM education to you. We hear often that CPIM education is either too easy or too hard, not targeted for their type of government, or quite frankly, boring. We hope by giving you access to ALL of the CPIM opportunities happening across the state that you'll be able to find courses that best suit your needs.

- This will open the dropdown menu of host organizations. Scroll to find **Ohio Association of School Business Officials (OASBO)**, and click on it.

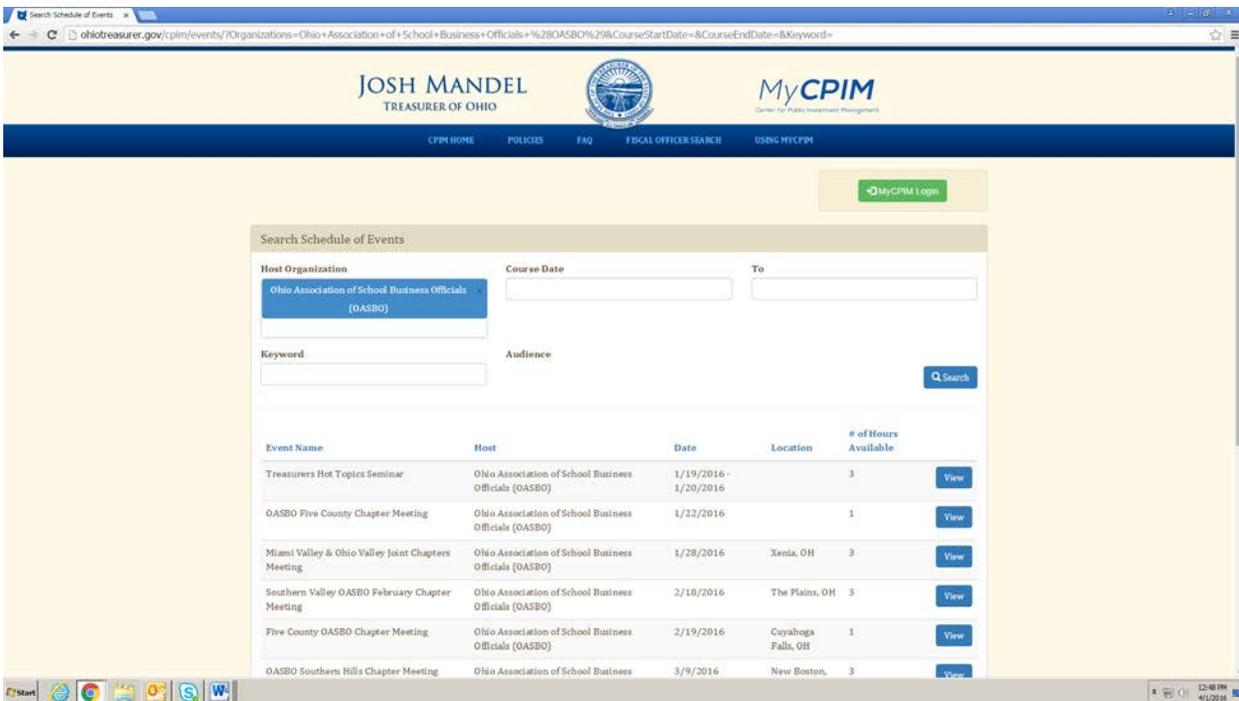


- Then, click **Search**.



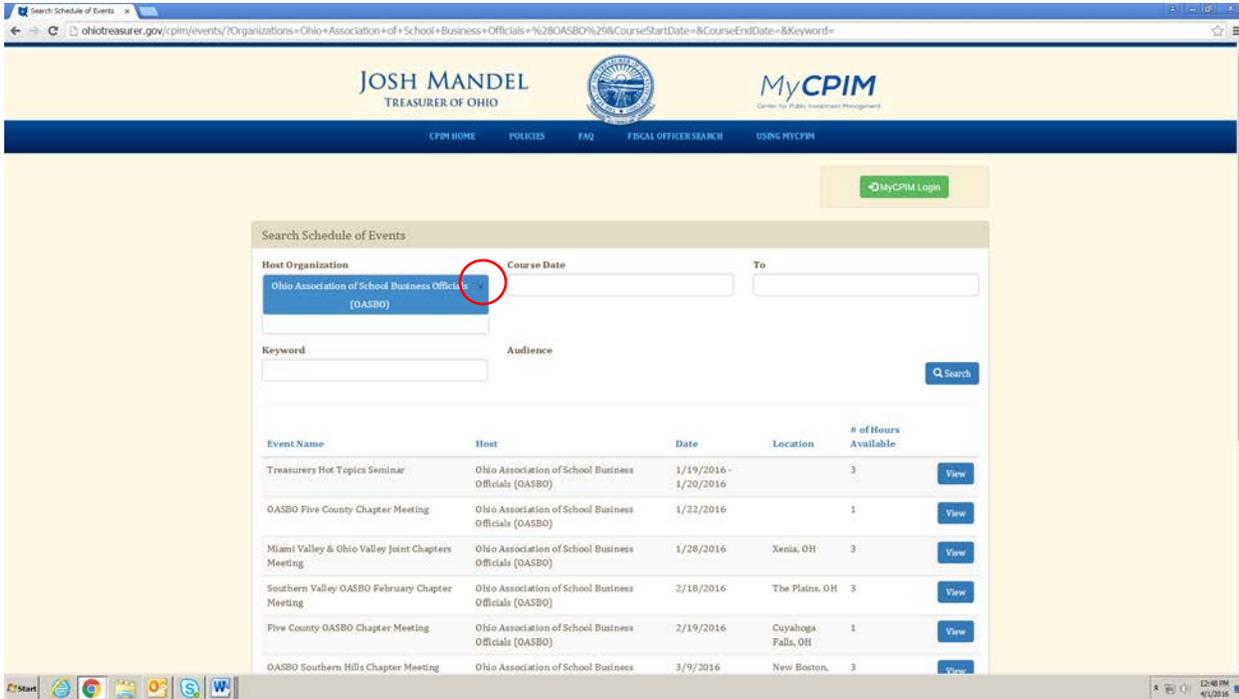
NOTE: The **Audience** search functions in the same way. Click inside the field, scroll and select, and click Search.

- The search will display all of OASBO's accredited events that either have occurred or are occurring this calendar year.

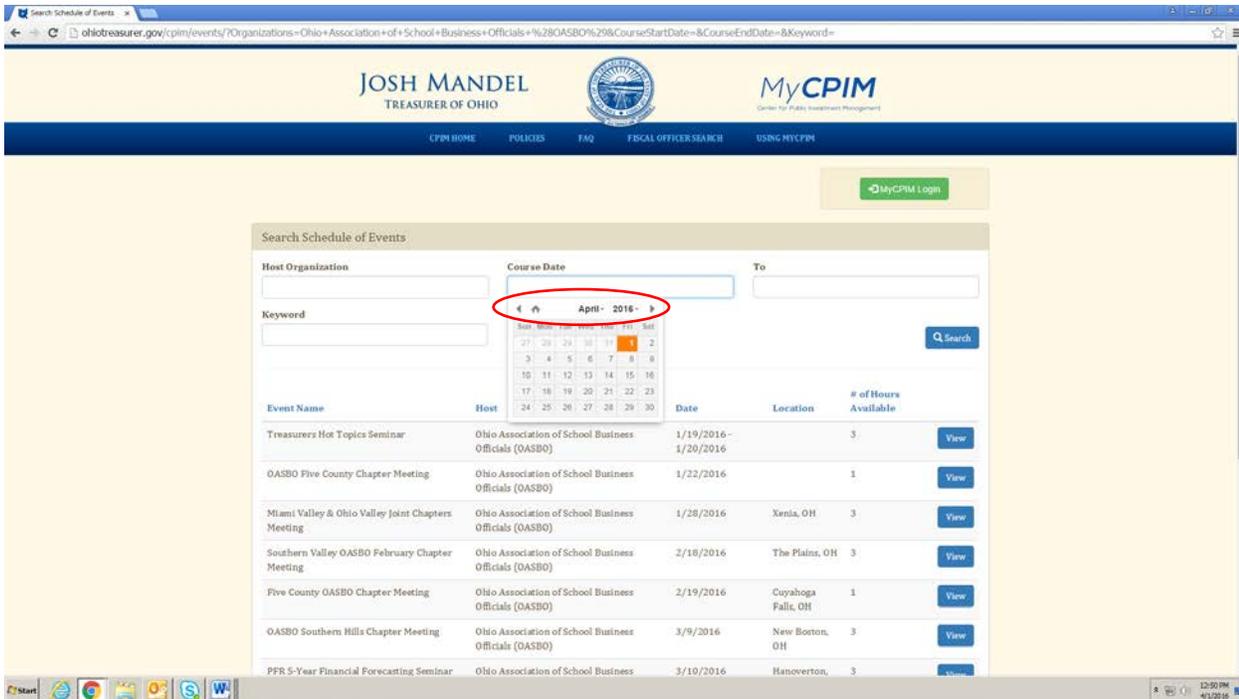


NOTE: We show courses that happened in the past so that other associations' education committees may use this search tool to find speakers or brainstorm topics for future conferences. It could also be useful to see events that have happened in the past so you can be on the lookout for them in the future if they are of interest to you.

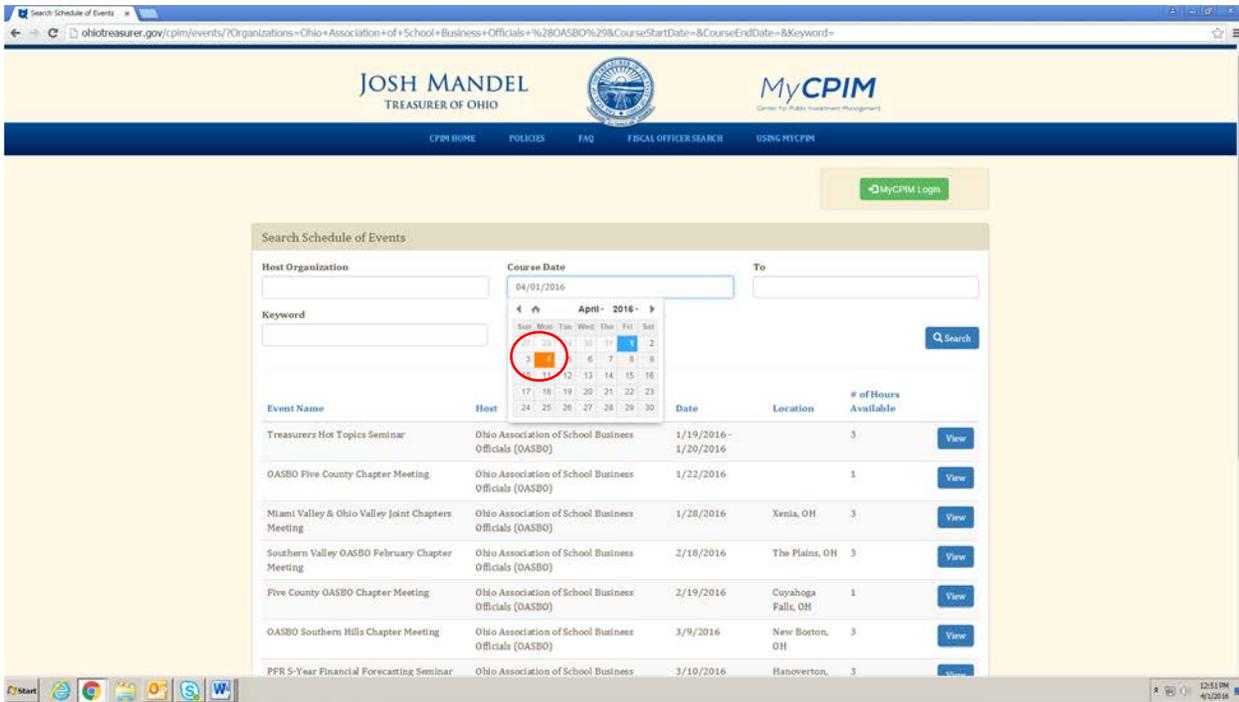
- If you know that you will have a two-week downtime at work, you could search for events happening in that two weeks. First, remove OASBO from the Host Organization field by clicking on the **x**.



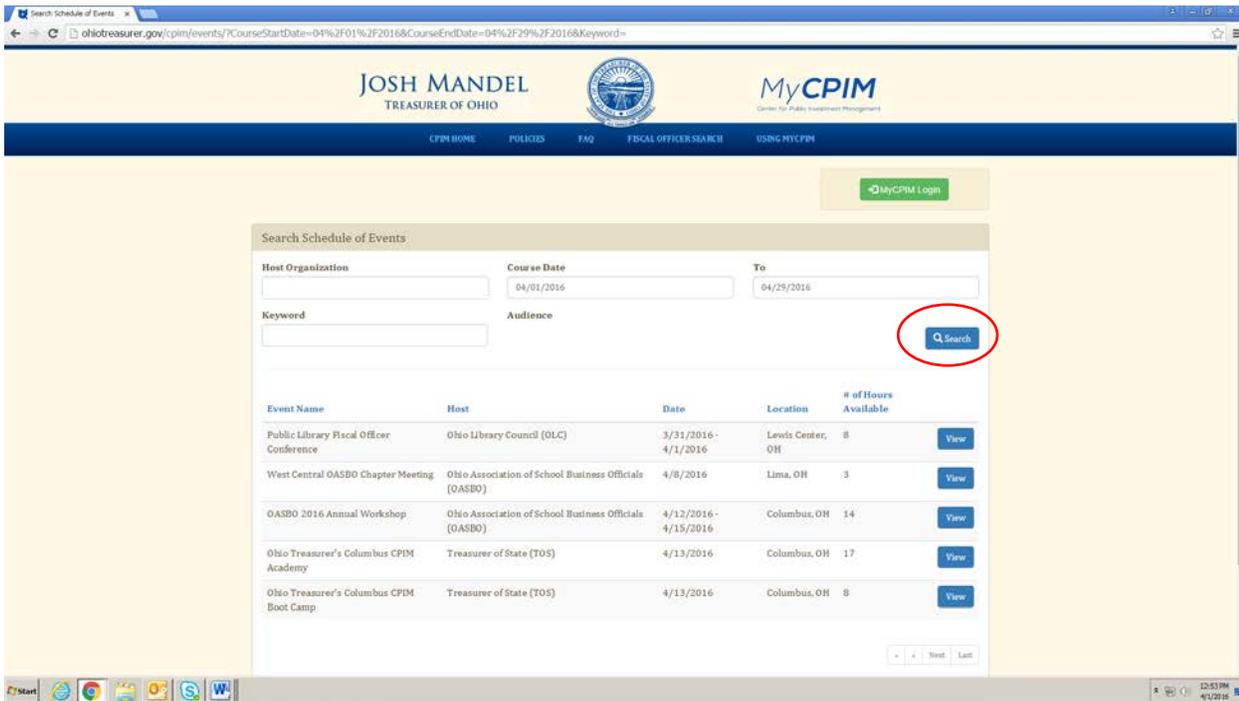
- Click inside the **Course Date** field to bring up a calendar view to select the beginning of the date range you're searching for. The left-right arrows on either side of the calendar header browse month to month. The down arrows next to the month and year will allow you to jump to an exact month and year.



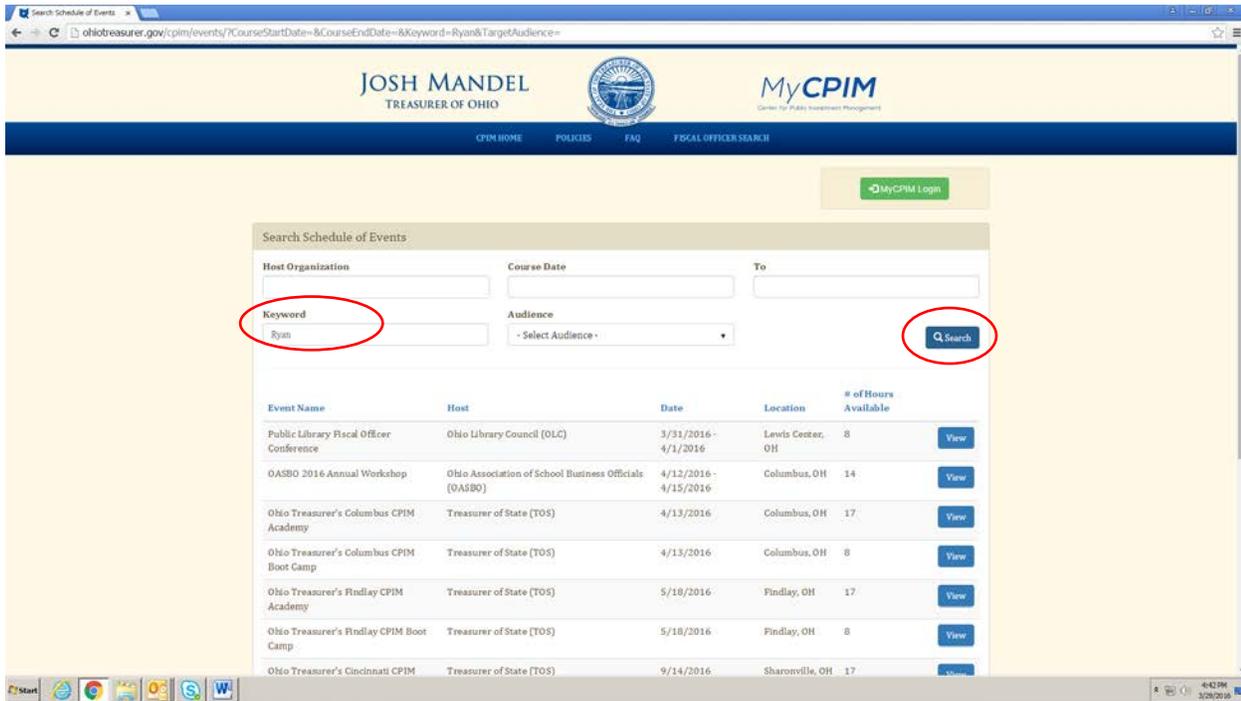
- Click on the date you would like the search to start. The date will appear in the **Course Date** field.



- Repeat the date selection process in the **To** field, and click **Search**.



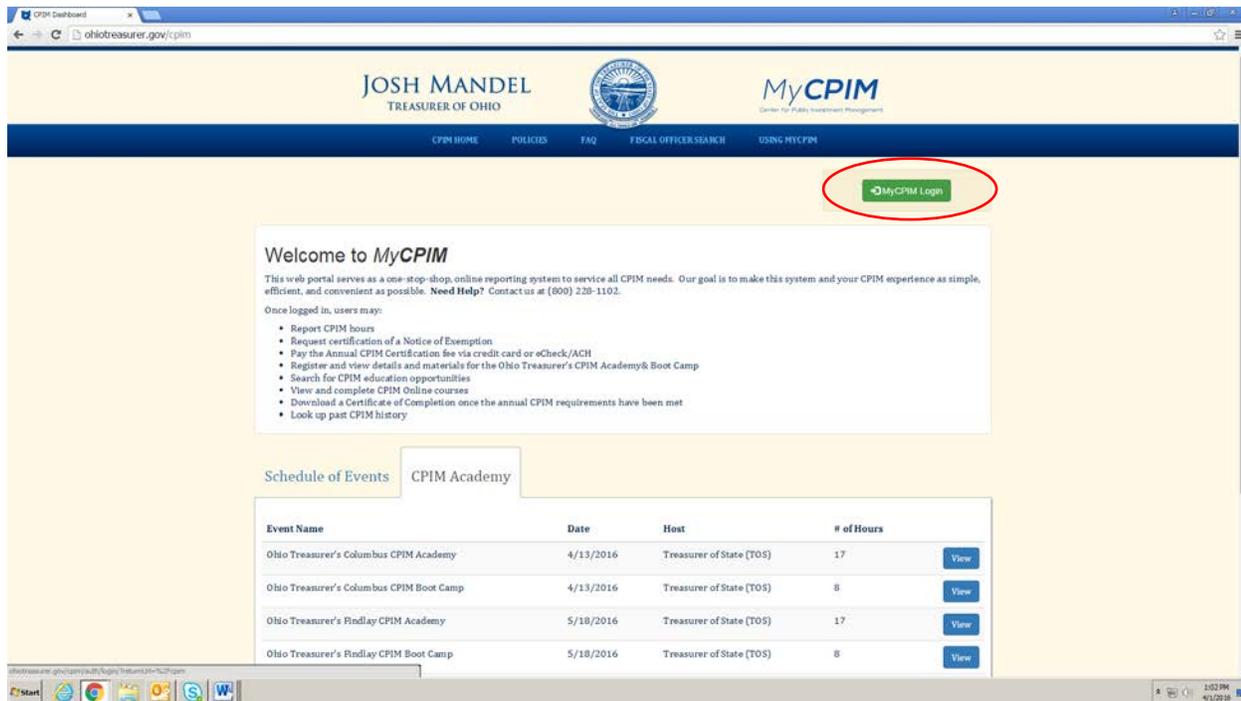
- Use the keyword field to search for any word that is used in event or course details such as the title, speaker name, or description. For example, say you remember a speaker named Ryan from a few years ago whom you enjoyed, so you want to see if he's teaching any future courses. Type *Ryan* into the **Keyword** field, and click **Search**.



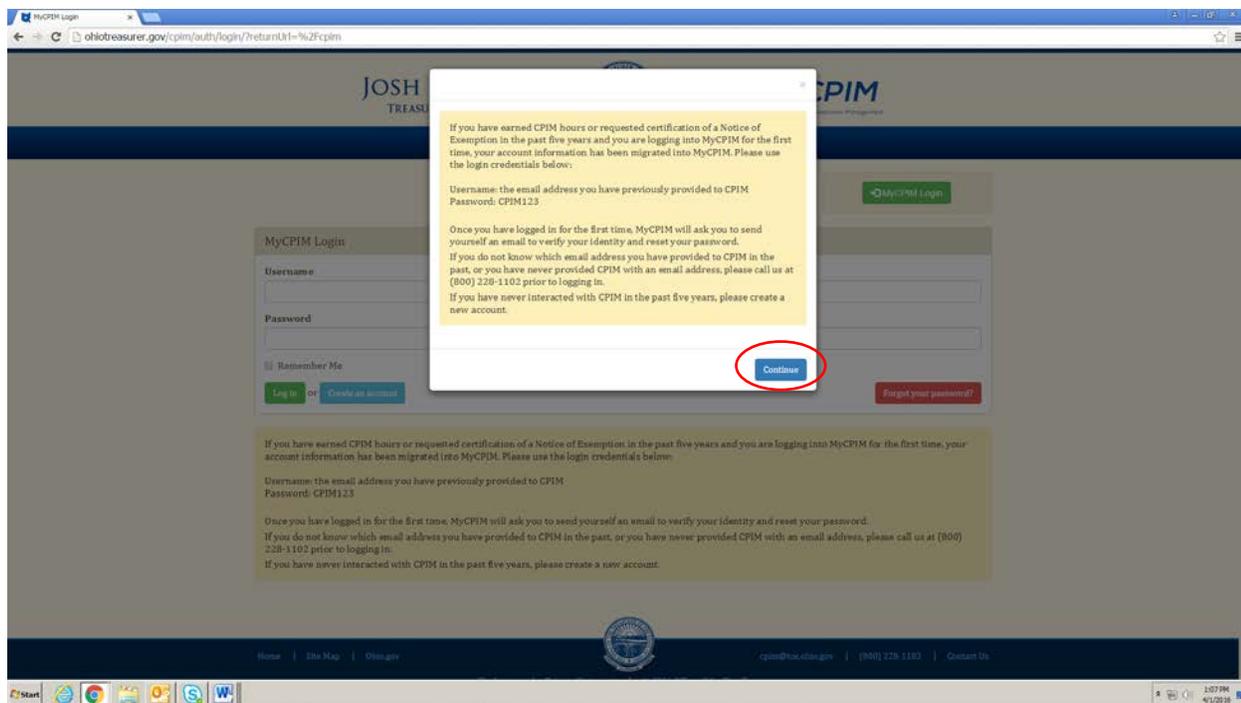
You will see all of the courses that Ryan has presented or is presenting in the future just by searching his name. You can also search for any topic, like finance, invest or even as specific as headwind.

MyCPIM Login

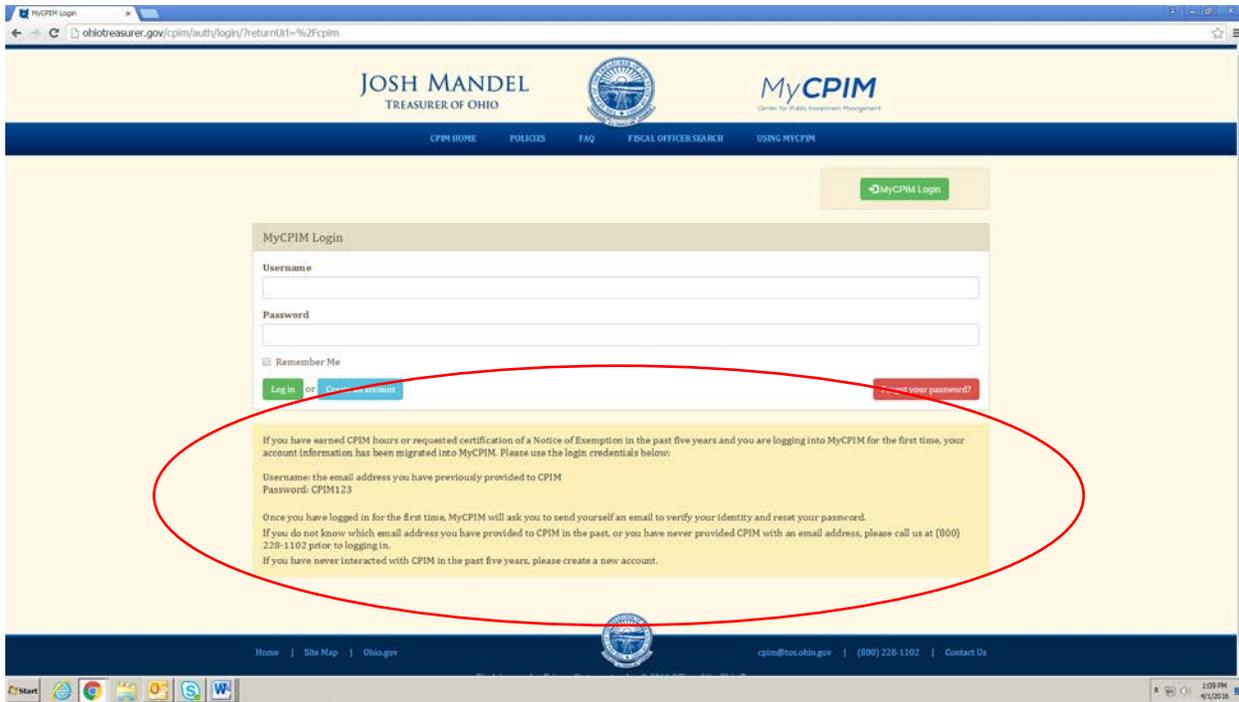
- MyCPIM includes functions that are only available after logging in. To log into MyCPIM, click **MyCPIM Login**.



- When you view this page for the first time, this pop up box will show up with instructions on how to log in for the first time if you have a migrated account. Click **Continue** to get to the login page.



- The instructions are also in the yellow box below the login fields.

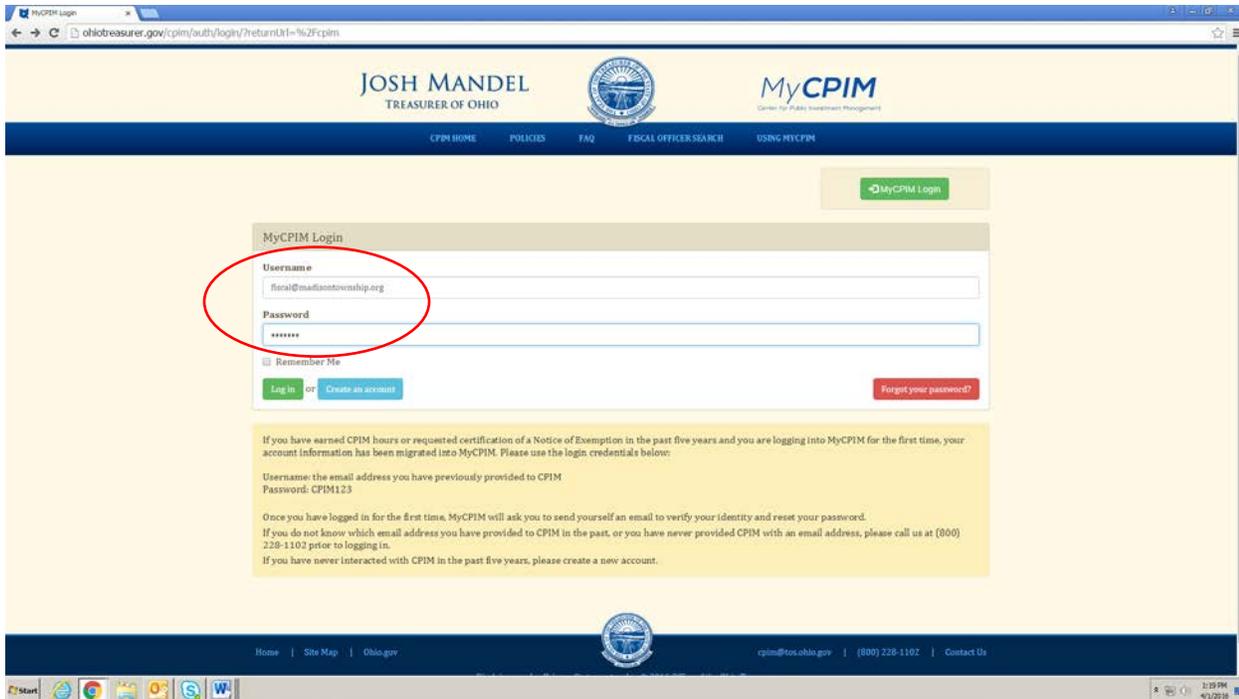


NOTE: If you have earned CPIM hours or filed an exemption in the past five years, your history has been migrated into MyCPIM. You simply need to recover your migrated account to log in.

NOTE: If you have **not** earned CPIM hours or filed an exemption in the past five years or are a new fiscal officer, you will need to create a new account. **Please skip to page 20 for instructions.**

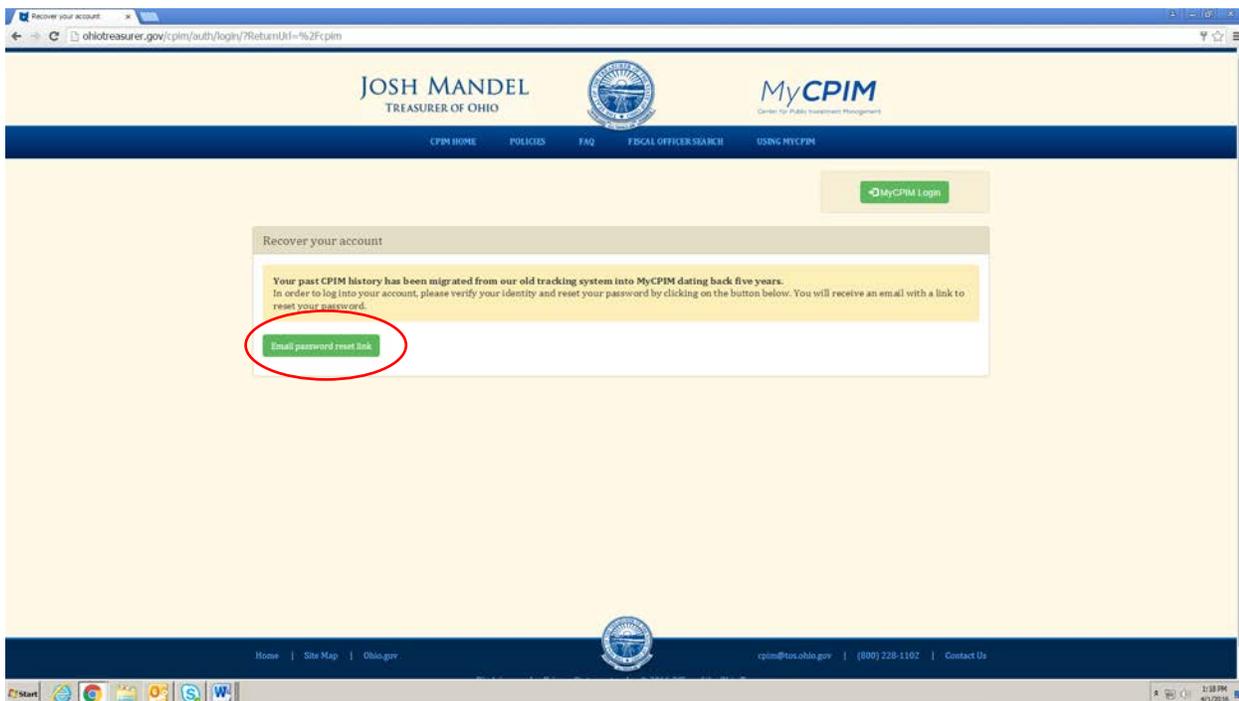
NOTE: Every user is required to have his/her own individual email. Users may **not** share email accounts. If you have ever shared an email account with another CPIM participant, please call us at (800) 228-1102 with your unique email address. We do, however, have a process in place for fiscal officers who inherit an email address from an outgoing fiscal officer. Please call us at (800) 228-1102, and we will complete this process over the phone.

- In order to recover your migrated account, type *the email address you have provided to CPIM in the past* into the **Username** field and **CPIM123** into the **Password** field.



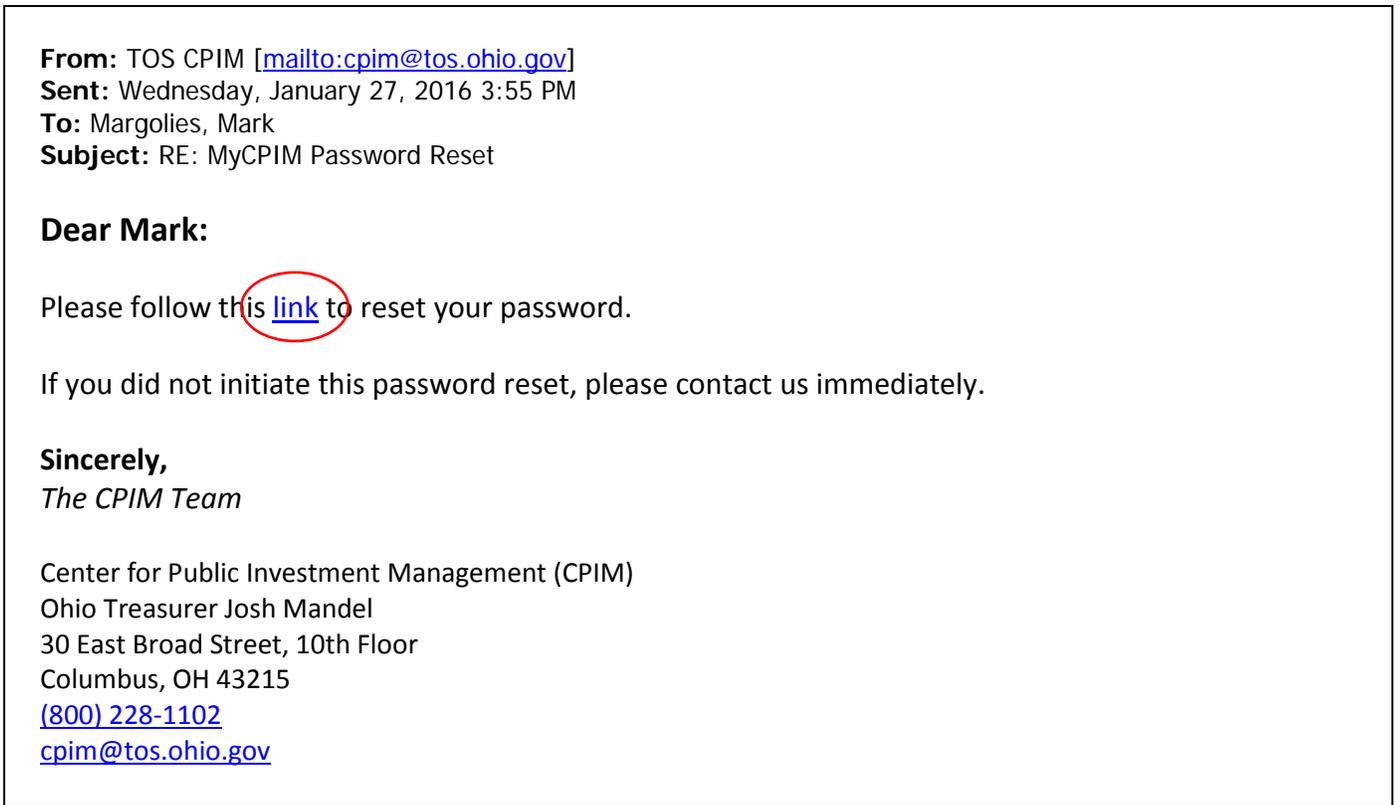
NOTE: If you do not remember which email address you have provided to CPIM, have never provided an email address in the past, or have any issues logging in using the email address you think should be on file, please call us at (800) 228-1102, and we will complete or update your profile.

- If accessed successfully, this page asking you to send yourself an email with a link to verify your identity and change your password will appear. Click **Email password reset link**.

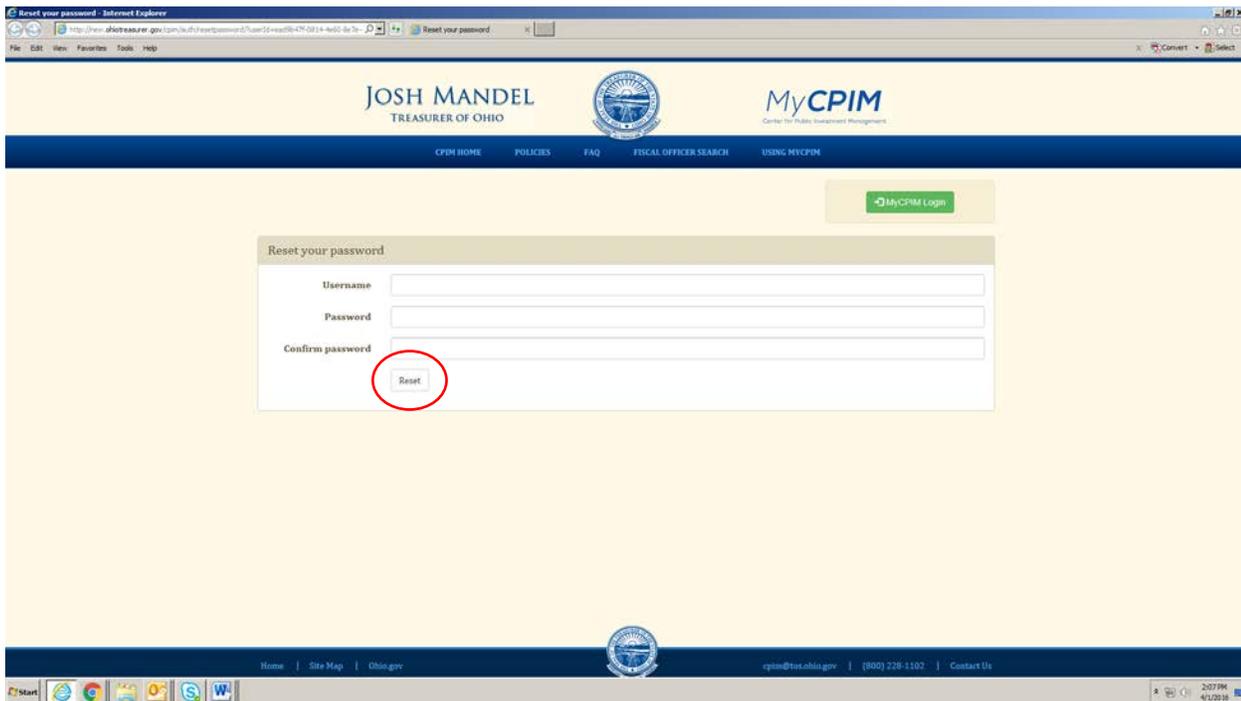


NOTE: AOL email accounts sometimes do not receive email messages from our server. You may be required to use a different account.

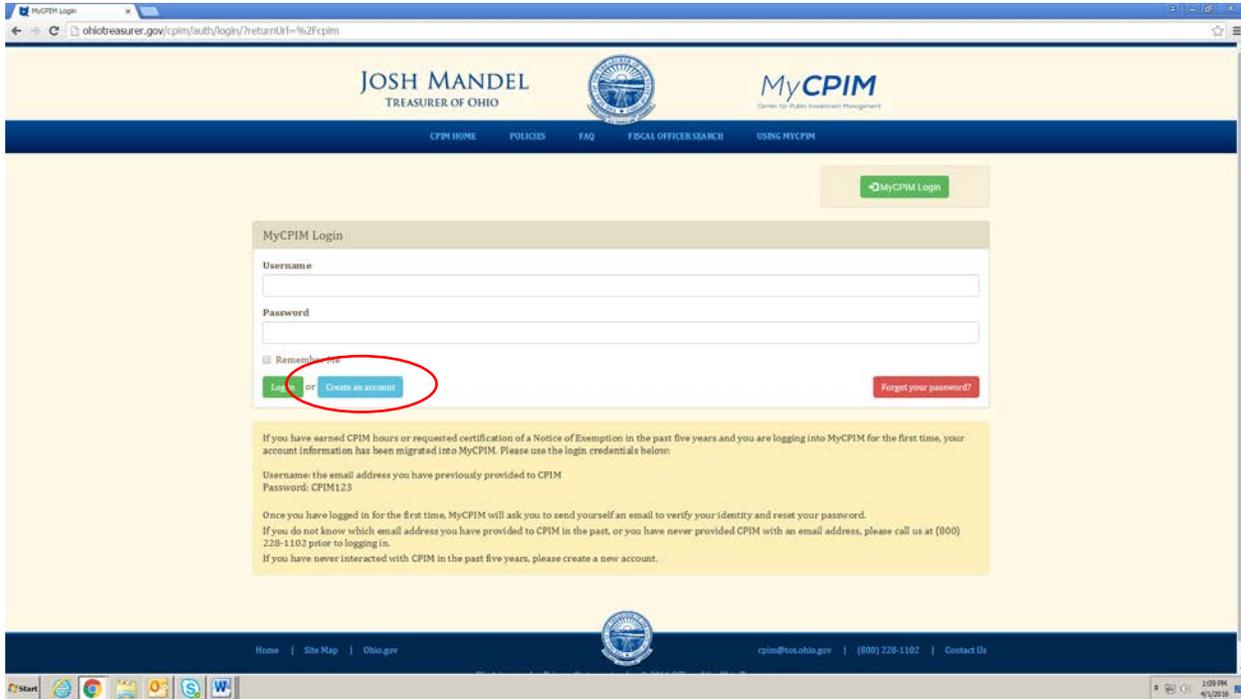
- You will receive an email asking to reset your password. Click [link](#).



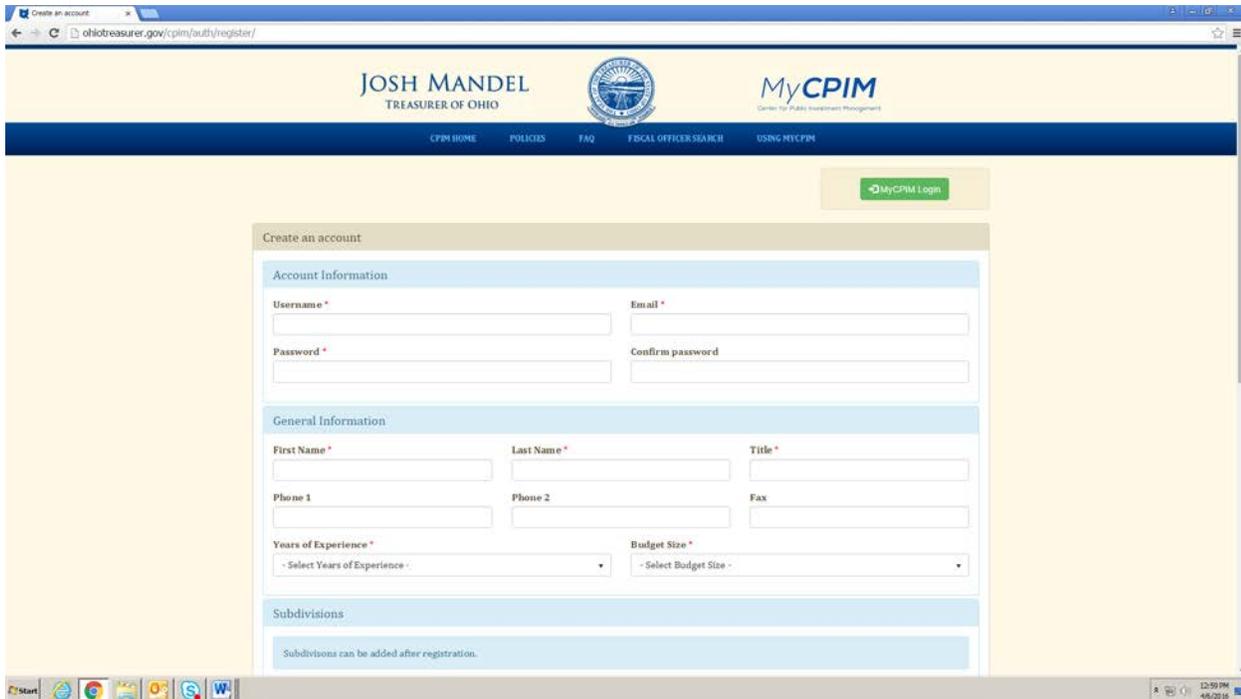
- The link will take you to this screen. Enter in your username (which is your email address) and the new password you just designated, and click **Reset**. Once you log in successfully for the first time, you'll be asked to update your profile. **Please skip to page 22 for instructions.**



- If you have **not** earned CPIM hours or filed an exemption in the past five years or are a new fiscal officer, on the MyCPIM Login screen, click **Create an account**.



- In the profile fields, type in a username (which should be your email address), email address, password, your name, and title. Select your years of experience and budget size in their respective dropdown menus. Continue scrolling.



NOTE: Your years of experience and budget size will help us to offer better targeted CPIM courses in the future. This information is not publically posted or viewable to anyone other than CPIM staff.

- You will be able to add your government subdivision(s) once you've created your profile. You may also enter in address information once you have created your profile. It will be required once you log in, so you might as well enter it at this point. Click **Register**.

Subdivisions

Subdivisions can be added after registration.

Business Address

Address

Address (Line 2)

City State Zip

Mailing Address

Address

Address (Line 2)

City State Zip

Cancel Register

Home Site Map Ohio.gov

cpim@tre.ohio.gov | (800) 228-1102 | Contact Us

Disclaimer Privacy Statement © 2016 Office of the Ohio Treasurer

- Once you have created your account, click **Continue to your profile** to finish entering your information.

JOSH MANDEL
TREASURER OF OHIO

MyCPIM
Center for Public Investment Management

CPIM HOME POLICIES FAQ FISCAL OFFICER SEARCH USING MYCPIM

SCHEDULE OF EVENTS ONLINE COURSES EXEMPTION CERTIFICATIONS PAY YOUR FEES

Warning: Your 2016 Annual CPIM Certification fee has NOT been paid. Click here to pay.

My Profile Logout

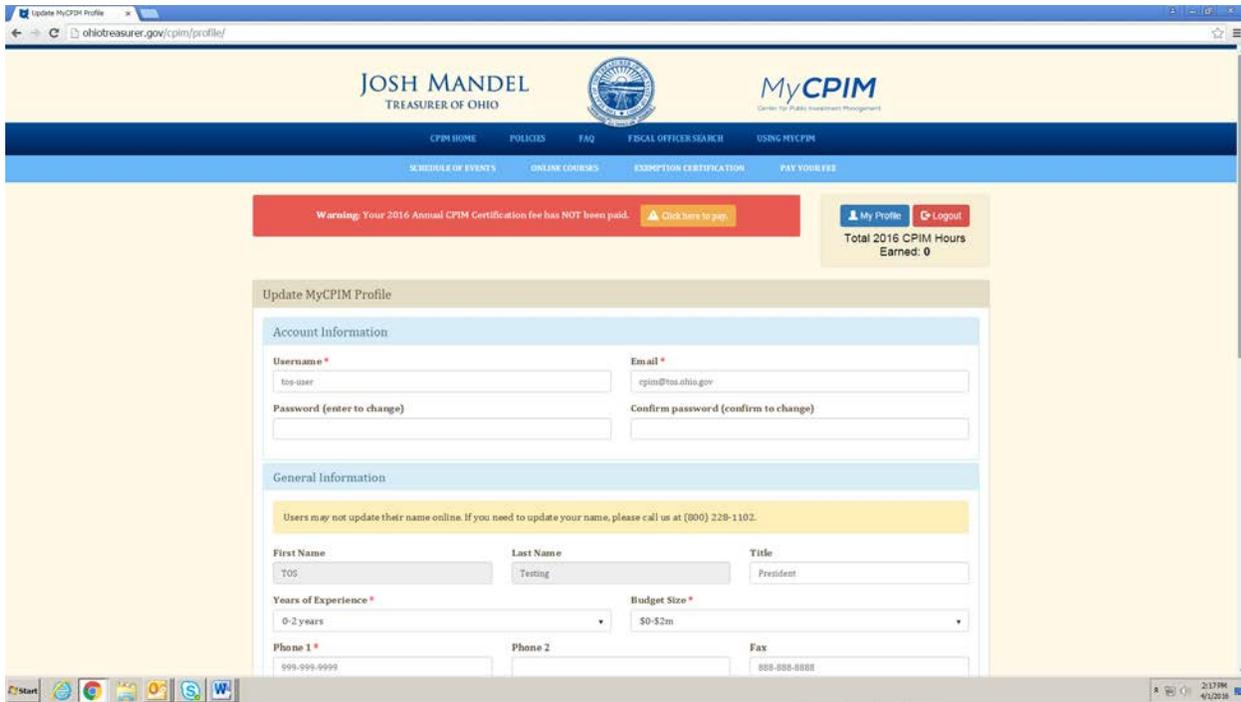
Total 2016 CPIM Hours Earned: 0

Account created

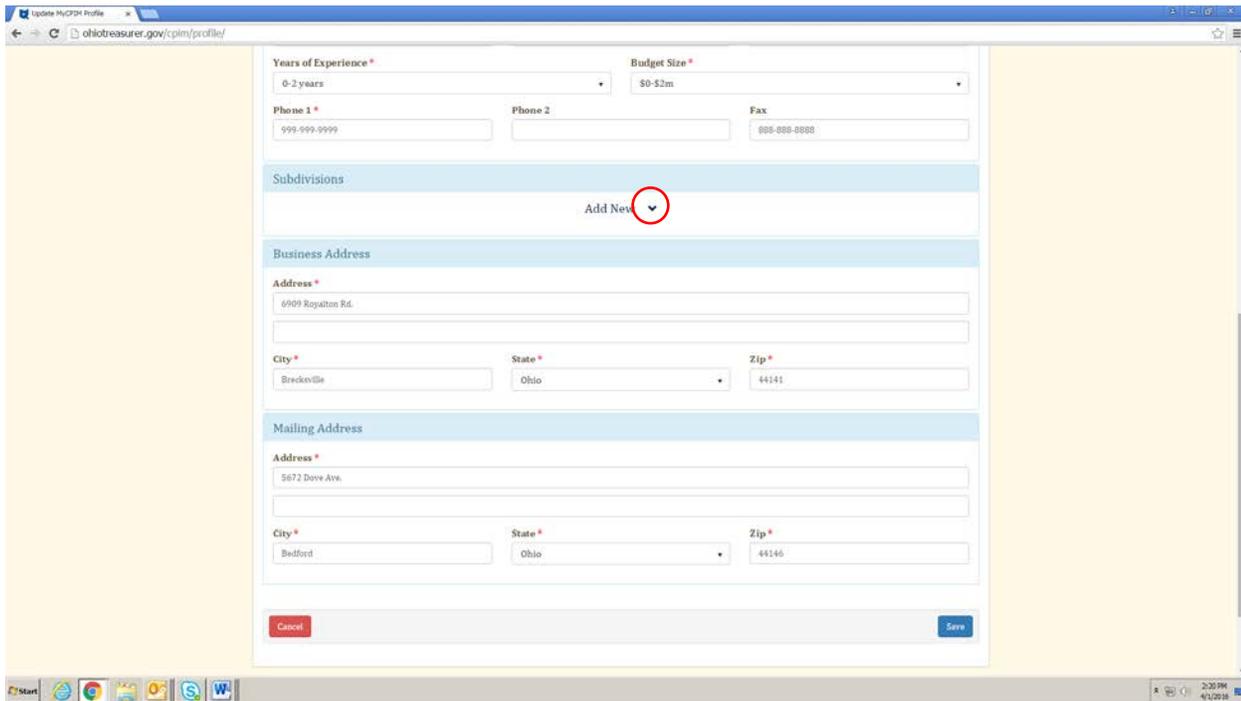
Thank you for registering for MyCPIM! If you have any questions or need help navigating MyCPIM, give us a call at (800) 228-1102.

Continue to your profile >

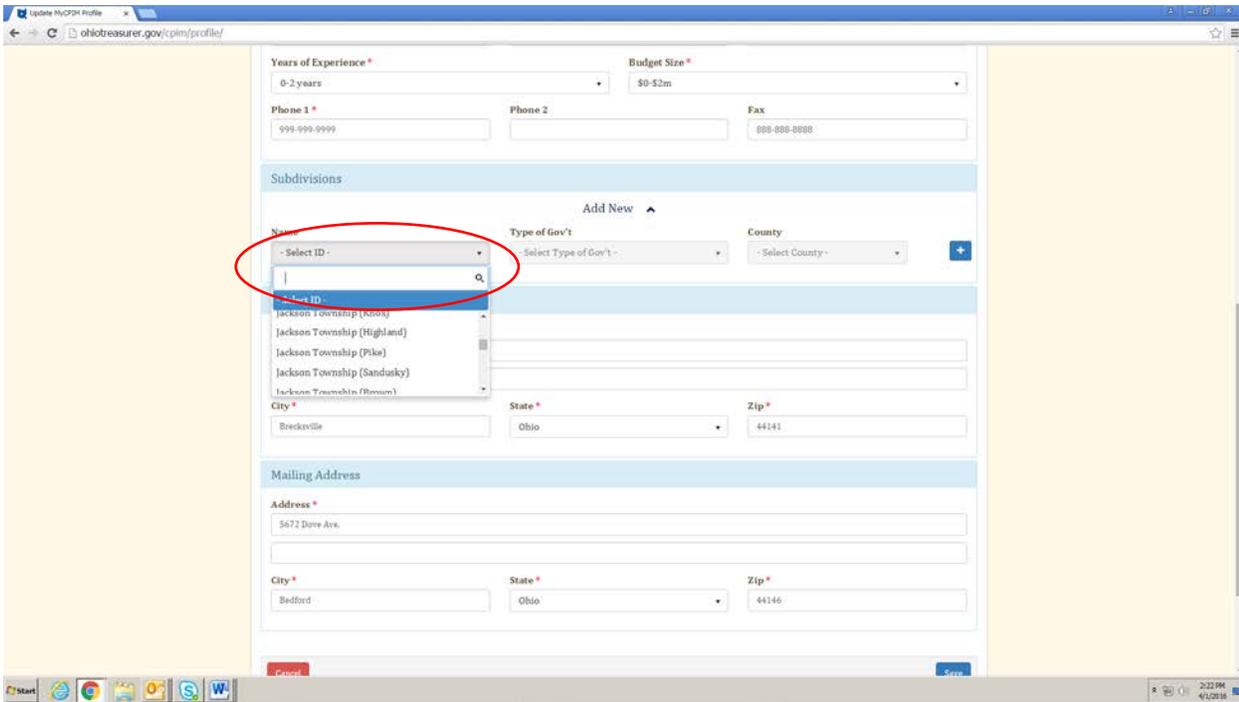
- Once you log in successfully for the first time, you will need to update, complete or confirm your profile.



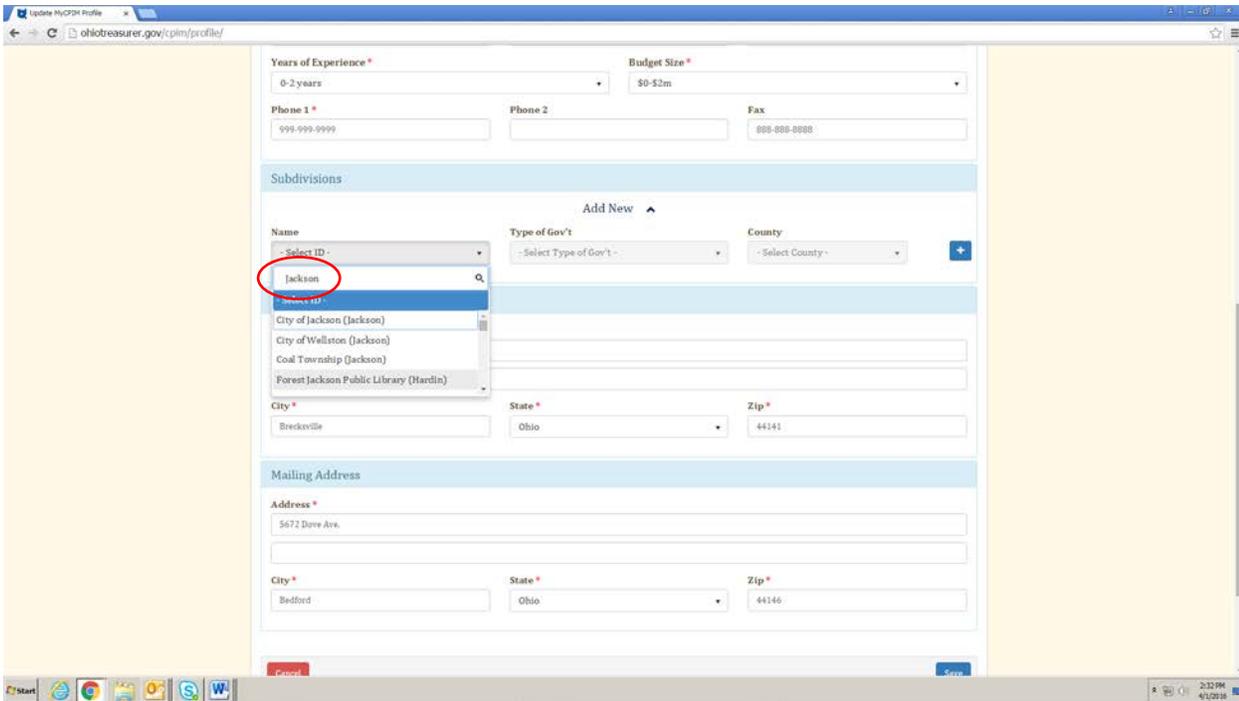
- To add or update a government subdivision, click on the down arrow next to **Add New**.



- Click inside of the **Name** field to view the search bar and dropdown menu.

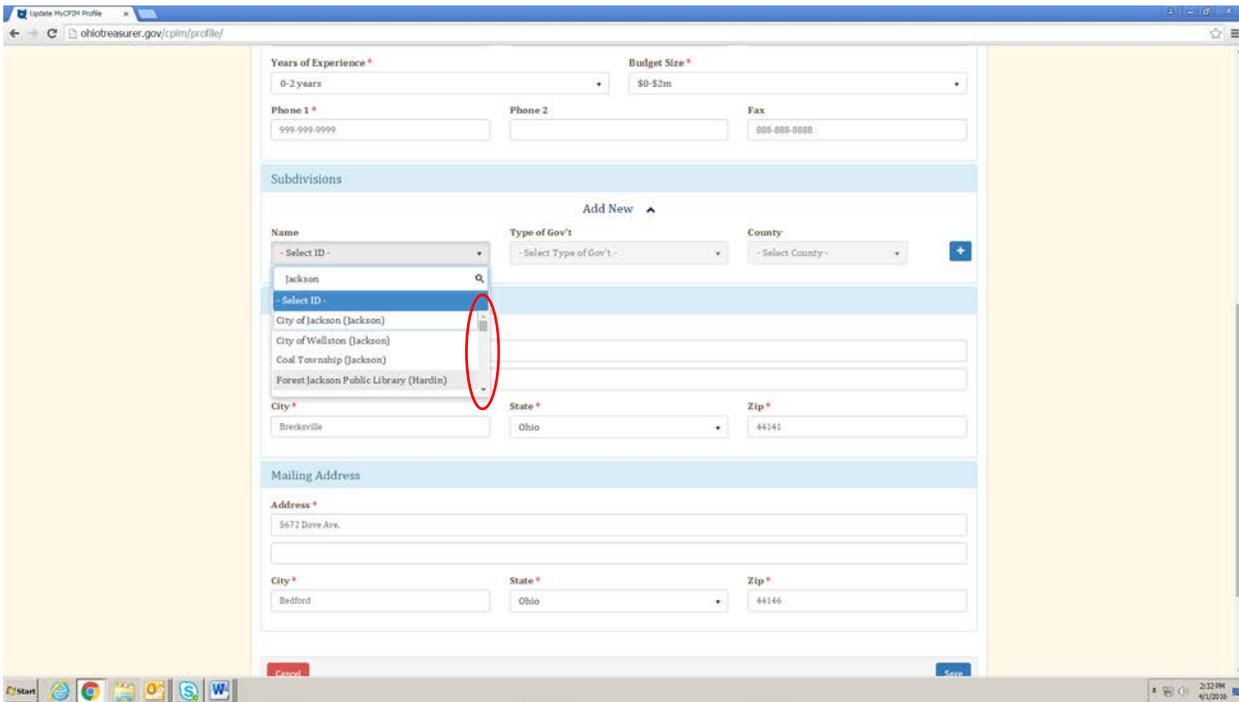


- Type *any part of the name of your subdivision* into the search bar. There are over 4000 subdivisions in Ohio (and thus in this dropdown list), so this will narrow your search. For example, if you type *Jackson* into the search bar, the dropdown menu will only show subdivisions with *Jackson* in the name.

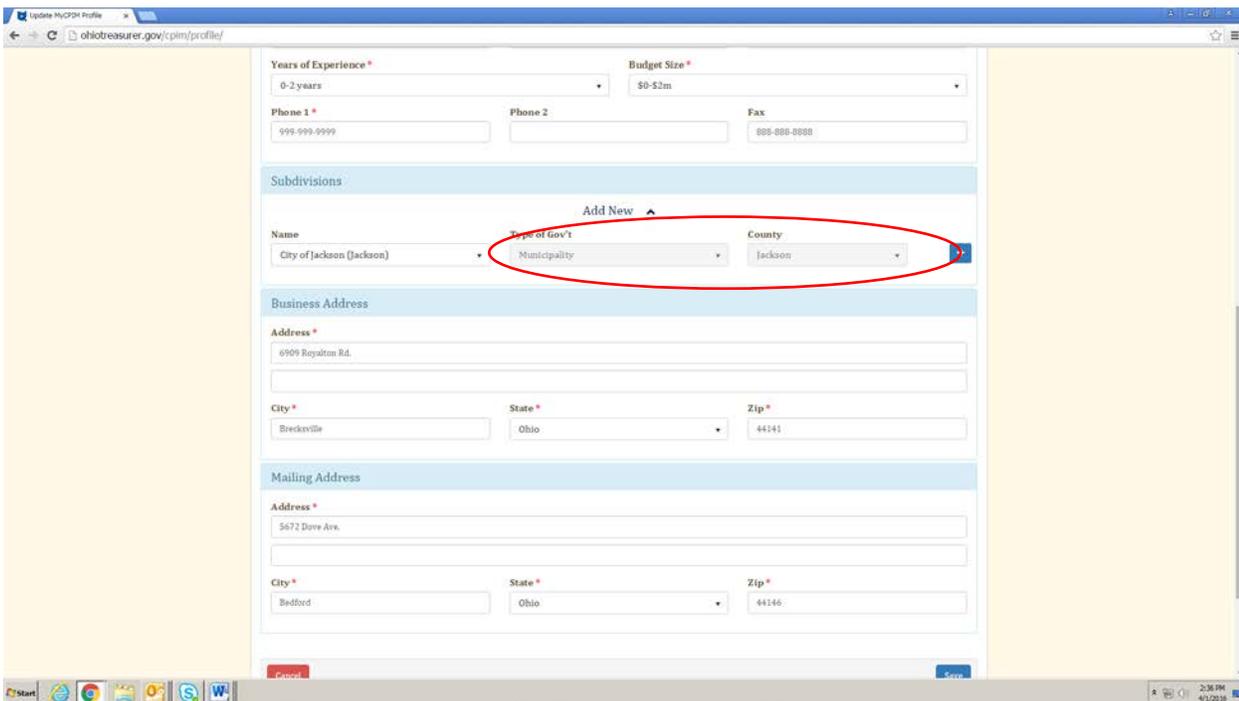


NOTE: All subdivisions' full names are in MyCPIM, so do not attempt to find abbreviated names.

- Use the scrolling arrows to the right of the subdivision **Name** dropdown to find your subdivision. You will notice that a county name is in parentheses next to each subdivision. This is because there are many subdivisions in Ohio that have the same name but are in different counties. Please be sure to select the subdivision with the appropriate county in parentheses.



- Once you have made your selection, the type of government and county fields will autopopulate. These cannot be manually changed. The only way they can be changed is to select a subdivision that is defined by these parameters. If done correctly, a green box will pop up in the bottom right hand corner of the screen that says *Subdivision Added*.



NOTE: If you represent a subdivision that is NOT on the list or you find an error in a name-type of government-county combination, please call us at (800) 228-1102 and we will add it to the list.

- To enter in a second subdivision, click +.

The screenshot shows a web browser window with the URL ohiotreasurer.gov/cpm/profile/. The page contains several form sections: "Years of Experience" (0-2 years), "Budget Size" (\$0-\$2m), "Phone 1" (999-999-9999), "Phone 2", and "Fax" (888-888-8888). Below these is the "Subdivisions" section, which includes an "Add New" button and three dropdown menus: "Name" (- Select ID -), "Type of Gov't" (- Select Type of Gov't -), and "County" (- Select County -). A red circle highlights a blue plus sign button to the right of the "County" dropdown. Below the "Subdivisions" section are "Business Address" and "Mailing Address" sections, each with an "Address" field, "City", "State", and "Zip" fields. The "Business Address" section shows "6909 Royalton Rd.", "Brecksville", "Ohio", and "44141". The "Mailing Address" section shows "5672 Dove Ave.", "Bedford", "Ohio", and "44146".

- This will bring up a second set of subdivision identifiers. Repeat the process above to select your subdivision.

This screenshot is similar to the one above, but the "Subdivisions" section now contains two rows of dropdown menus. The first row has "Name" (City of Jackson (Jackson)), "Type of Gov't" (Municipality), and "County" (Jackson). The second row has "Name" (- Select ID -), "Type of Gov't" (- Select Type of Gov't -), and "County" (- Select County -). A red oval highlights the second row of dropdown menus, and a red plus sign button is visible to its right. The rest of the form, including the "Business Address" and "Mailing Address" sections, remains the same as in the previous screenshot.

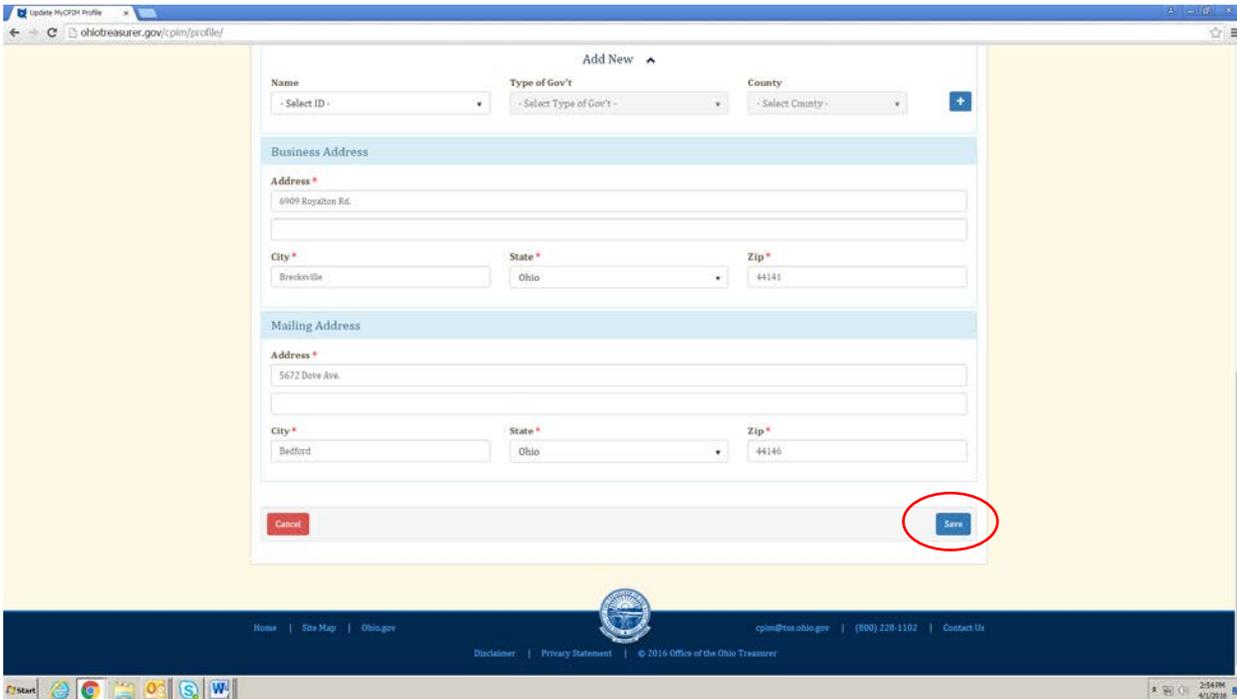
- To remove a subdivision, click **x** to the right of the subdivision you wish to delete. It will ask you to confirm your request to delete in order to do so. Click **OK**. Also, a green box will pop up in the bottom right hand corner of the screen that says *Successfully Removed*.

The screenshot shows a web browser window with the URL ohiotreasurer.gov/cpm/profile/. The page contains several form sections: 'Years of Experience' (0-2 years), 'Budget Size' (\$0-\$2m), 'Phone 1' (999-999-9999), 'Phone 2', and 'Fax' (888-888-8888). Below these is the 'Subdivisions' section with an 'Add New' button. A table lists subdivisions with columns for Name, Type of Gov't, and County. The first entry is 'Ada Exempted Village School District (Ha...)' with 'School District' as the type and 'Hardin' as the county. A red circle highlights a small 'x' icon to the right of this entry. Below the table are sections for 'Business Address' and 'Mailing Address', each with fields for Address, City, State, and Zip.

- Enter in a business address (where your subdivision is located) and a mailing address. In most cases, these addresses may be the same.

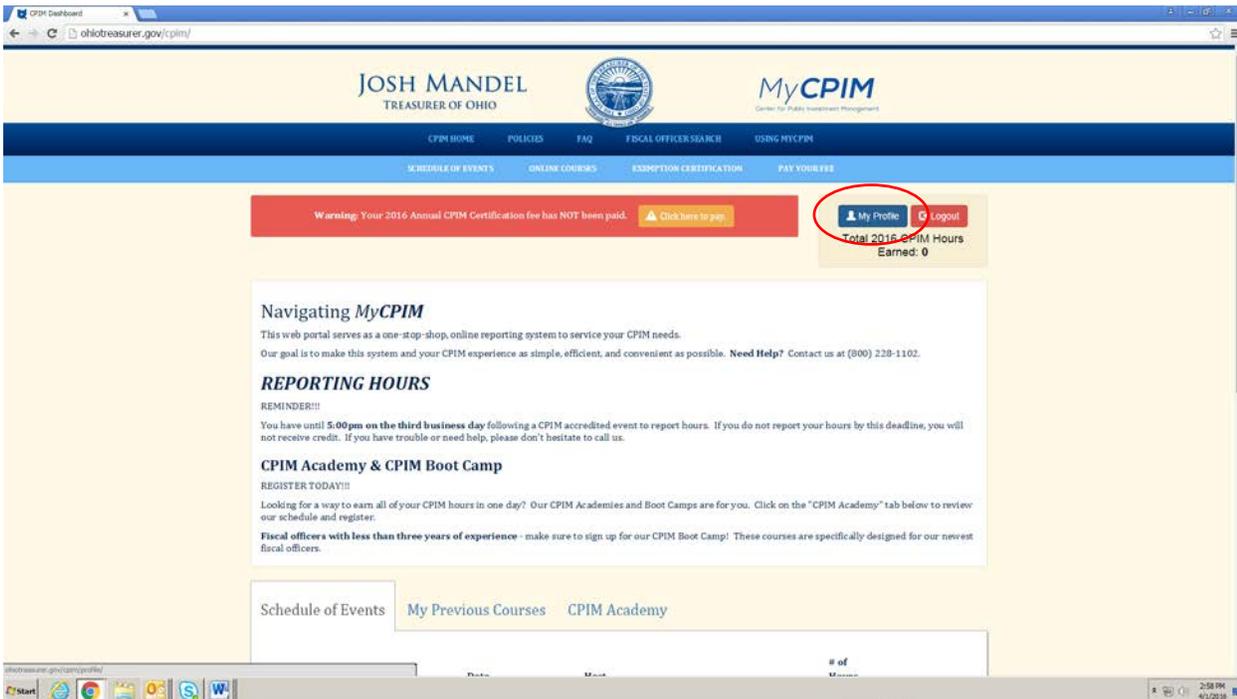
This screenshot shows the 'Add New' form for adding a subdivision. The form includes dropdown menus for Name, Type of Gov't, and County. Below these are two sections: 'Business Address' and 'Mailing Address', both highlighted with red circles. Each section has fields for Address, City, State, and Zip. The 'Business Address' section contains the text '6909 Royalton Rd.', 'Brecksville', 'Ohio', and '44141'. The 'Mailing Address' section contains '5672 Dove Ave.', 'Bedford', 'Ohio', and '44146'. At the bottom of the form are 'Cancel' and 'Save' buttons. The footer of the page includes navigation links, a disclaimer, and contact information for the Ohio Treasurer's Office.

- Click **Save** and it will take you to the home page. A green box will pop up in the bottom right hand corner of the screen that says *Profile updated successfully*. You will also receive an email confirmation that your profile has been updated.



NOTE: If you ever receive this email and you did NOT update your profile, please call us at (800) 228-1102.

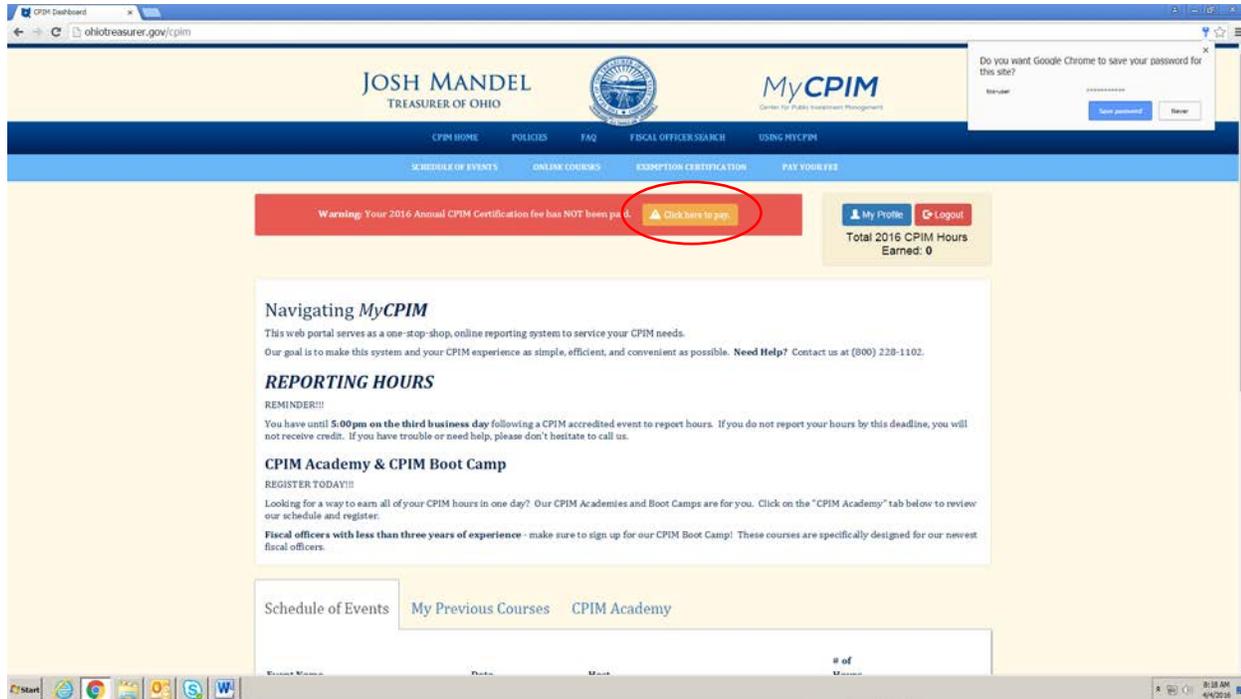
- At any time, once logged in, you may access your MyCPIM Profile from the **Hours Earned** box. The same steps taken to update your profile upon initial log in apply. You may also update your password from your profile.



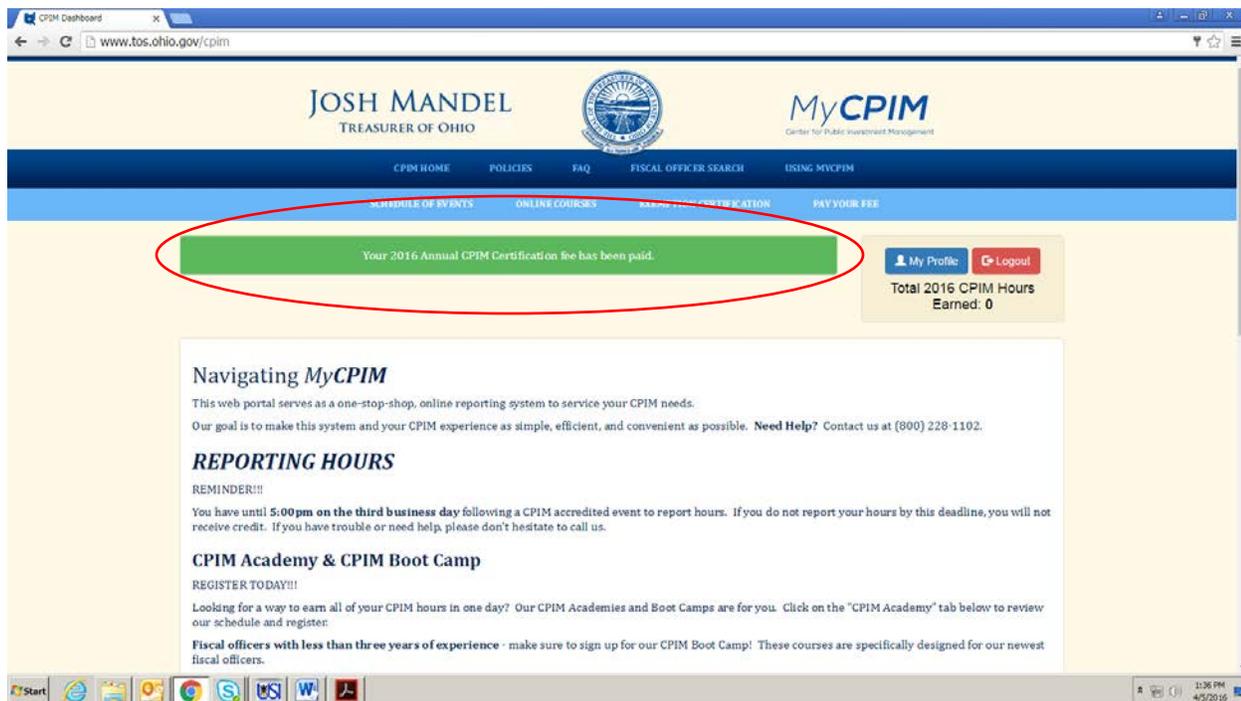
NOTE: Be sure to keep your profile up to date. For security and data integrity purposes, users may not update their name. Please call us at (800) 228-1102 for any name changes.

MyCPIM homepage once logged in

- At the top is all you need to know about your annual CPIM requirements. The top two questions we get is, "Have I paid my fee?" and "How many hours have I earned?" Now the answers to both of these questions are available right when you log into MyCPIM. The **Payment Box** will be red if you have not paid your fee. Click **Click here to pay**, and it will take you to the payment page.



- This box will be green if you have paid your fee. It will turn red on January 1st. It will turn yellow if you have an exemption.



- The **Hours Earned** box shows how many hours you've earned this year so far.

The screenshot shows the MyCPIM dashboard for Josh Mandel, Treasurer of Ohio. At the top, there is a navigation bar with links for CPIM HOME, POLICYS, FAQ, FISCAL OFFICER SEARCH, and USING MYCPIM. Below this is a secondary navigation bar with links for SCHEDULE OF EVENTS, ONLINE COURSES, EXEMPTION CERTIFICATION, and PAY YOUR FEE. A red warning banner at the top center states: "Warning: Your 2016 Annual CPIM Certification fee has NOT been paid." with a "Click here to pay" button. In the top right corner, there is a box with a red border containing the text "Total 2016 CPIM Hours Earned: 0". The main content area features a section titled "Navigating MyCPIM" with a sub-header "REPORTING HOURS" and a "REMINDER!!!" section. Below this is a section for "CPIM Academy & CPIM Boot Camp" with a "REGISTER TODAY!!!" sub-header. At the bottom of the main content area, there are tabs for "Schedule of Events", "My Previous Courses", and "CPIM Academy". The Windows taskbar is visible at the bottom of the screen.

Light Blue Navigation Bar

- You can access all of the functions of MyCPIM in the light blue navigation bar at the top. Click **SCHEDULE OF EVENTS** to view same Schedule of Events search page from page 11.

Warning: Your 2016 Annual CPIM Certification fee has NOT been paid. [Click here to pay.](#)

My Profile Logout
Total 2016 CPIM Hours Earned: 0

Search Schedule of Events

Host Organization Course Date To
Keyword Audience

Event Name	Host	Date	Location	# of Hours Available
West Central OASBO Chapter Meeting	Ohio Association of School Business Officials (OASBO)	4/8/2016	Lima, OH	3
OASBO 2016 Annual Workshop	Ohio Association of School Business Officials (OASBO)	4/12/2016 - 4/15/2016	Columbus, OH	14
Ohio Treasurer's Columbus CPIM Academy	Treasurer of State (TOS)	4/13/2016	Columbus, OH	17
Ohio Treasurer's Columbus CPIM Boot Camp	Treasurer of State (TOS)	4/13/2016	Columbus, OH	8
Ohio Treasurer's Findlay CPIM Academy	Treasurer of State (TOS)	5/18/2016	Findlay, OH	17

NOTE: You'll notice one additional function appears once you are logged in – the **Register** button next to Treasurer of State hosted CPIM conferences. **Please skip to page 41 for instructions on how to register.**

- Click **ONLINE COURSES** to view our CPIM Online course library.

Warning: Your 2016 Annual CPIM Certification fee has NOT been paid. [Click here to pay.](#)

My Profile Logout
Total 2016 CPIM Hours Earned: 0

Welcome to CPIM Online

Below is a list of courses offered directly through CPIM Online. Simply download and print the materials if you wish to follow along, click on the play button, and MyCPIM will report your CPIM hours for you.

Need help? Call us at (800) 228-1102.

Additional Viewing Instructions:

- Each CPIM Online course has two- or four quiz sections. You must answer each set of quiz questions with at least 50% accuracy in order to move onto the next section. If you do not answer the questions with 50% accuracy, you will be required to watch the previous section again. You may not earn duplicate CPIM hours for time spent rewatching a section.
- If you happen to lose access to the internet or need to step away while you're viewing the course, MyCPIM will record the last quiz section that you successfully passed. When you come back to press play again for that particular course, you will begin right after the last quiz that you successfully passed. CPIM hours will not be reported until the course has been successfully completed.
- Once you have completed the course, be sure to click on "Return to MyCPIM" button in the pop up screen at the end of the course. This will take you back to the CPIM Online course menu. Click on "CPIM Home" to see the course appear under your "My Previous Courses" tab. The hours earned will show as "0" until the CPIM staff has verified the hours. Once we have verified your hours, you will receive a confirmation email stating that your hours have been reported. If you have paid your fee, your hours earned will appear on the "My Previous Courses" tab. If you have not paid your fee, the hours will show as "Pending Payment" until a payment is made.

Please Note:

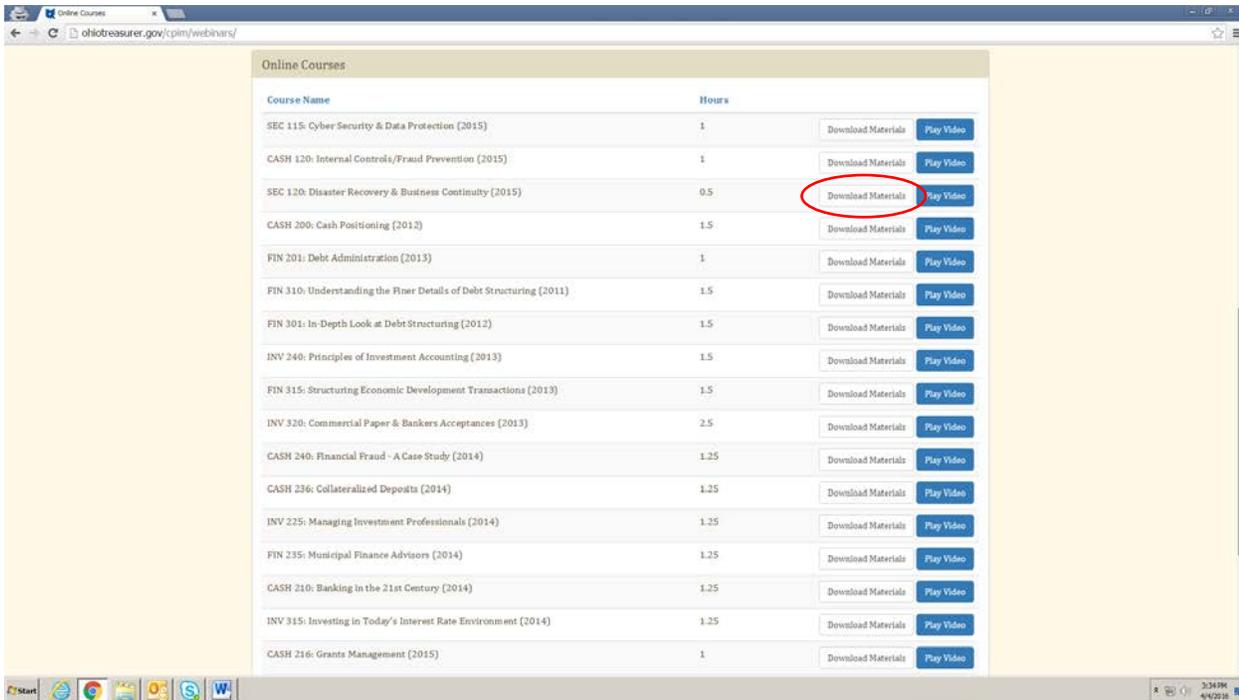
- Do not maximize the viewing window. You will not be able to successfully see all of the quiz questions.
- Mobile viewing is not supported at this time. Please do not try to access these videos from your phone or tablet.

Policies:

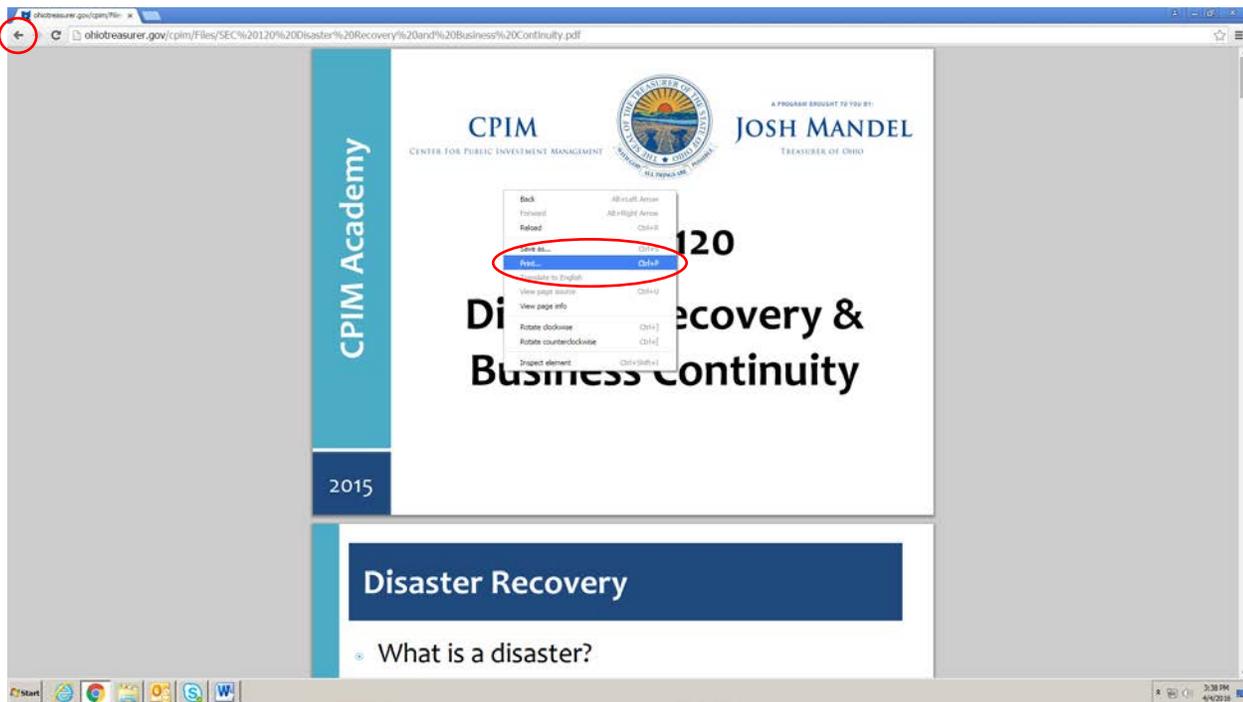
- You may not receive credit for an online course that you have previously viewed in the past five years.
- You may not receive credit for an online course if you have attended the same course at a CPIM Academy within the same calendar year. For example, if you attend CASH 200 at CPIM Academy in April 2016 you may not watch the CASH 200 online course in October 2016 for credit. You may, however, take the CASH 200 online course in January 2017 for credit.

NOTE: Be sure to read through all of the policies listed on this page before selecting which course to watch.

- First, download the PowerPoint materials for the course you wish to take by clicking **Download Materials**.

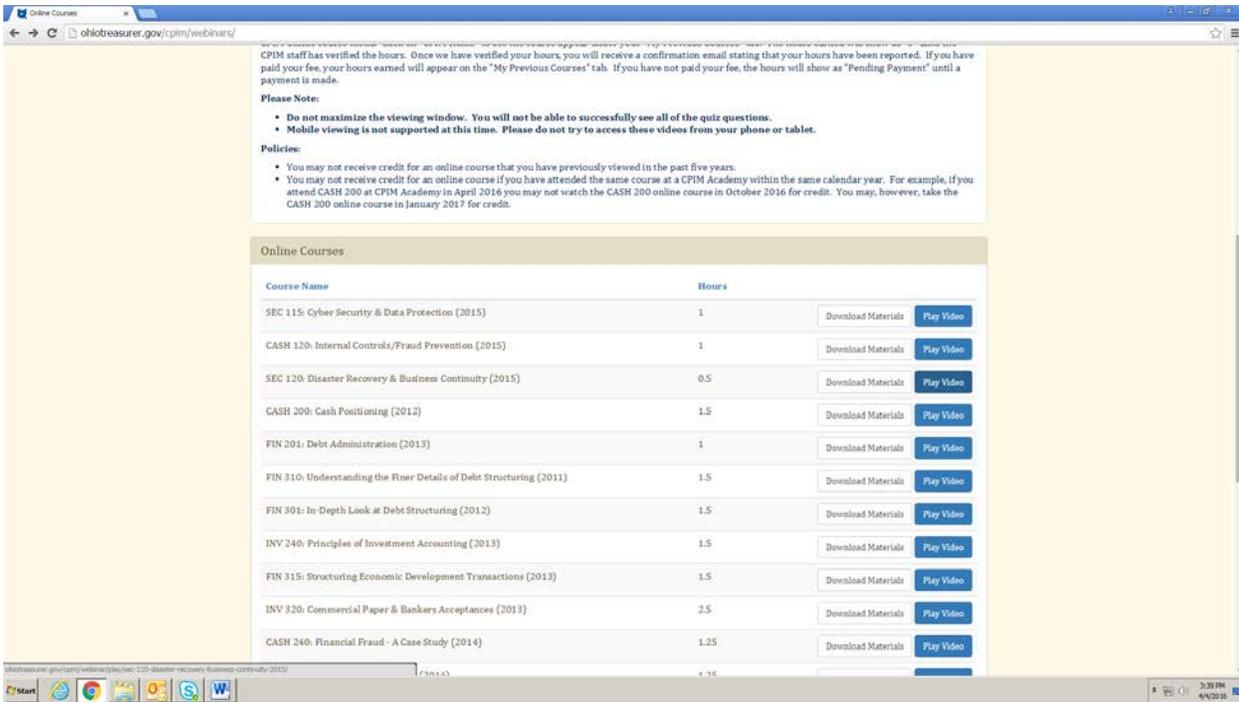


- This will go to a PDF page. To print, right click on the document, and select **Print**. To go back to CPIM Online, click the browser back arrow.



NOTE: Some of the slides are not well viewed in the videos, so it's worth it to print the materials to follow along.

- Click **Play Video** to start the course. The course will start playing immediately.



NOTE: **Do not** maximize the viewing window. You will not be able to successfully see all of the quiz questions. Mobile viewing is not supported at this time. **Do not** try to watch these videos from a phone or tablet. You may not fast forward through the video, but you may rewind.

- At various points during the video, a quiz will pop up. Answer each question, and click **Submit Quiz**.



NOTE: Each CPIM Online course has two to four quiz sections. You must answer each set of quiz questions with at least 50% accuracy in order to move onto the next section. If you do not answer the questions with at least 50% accuracy, you will be required to watch the section again. You will not earn CPIM hours for time spent rewatching a section.

- A notification will appear stating if you have answered with at least 50% accuracy and therefore may continue or if you did not answer with at least 50% accuracy and therefore need to rewatch the section. Click **Continue**.

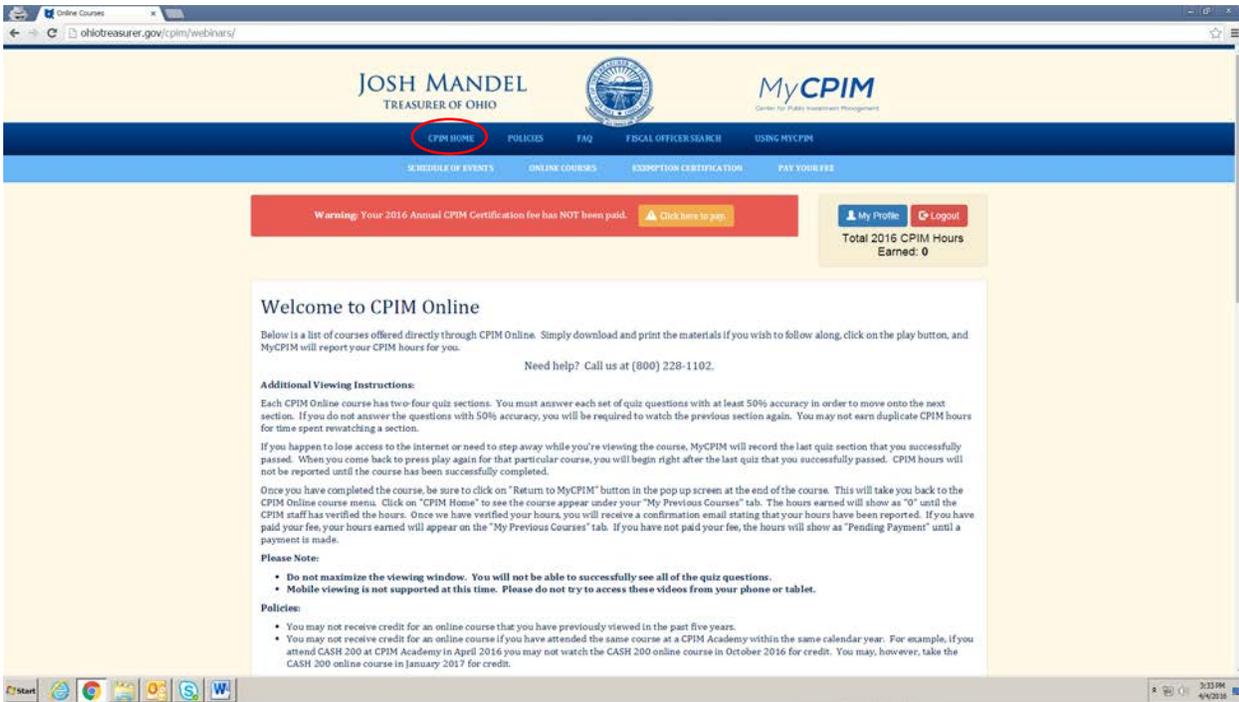


NOTE: If you lose access to the internet or need to log out midway through viewing the course, MyCPIM will record the last quiz section that you successfully passed. Log back in and click **Play Video** for that particular course, and you will begin right after the last quiz that you successfully passed. You may be required to rewatch a portion of the section depending on how close to the next quiz you were. CPIM hours will not be reported until the course has been successfully completed.

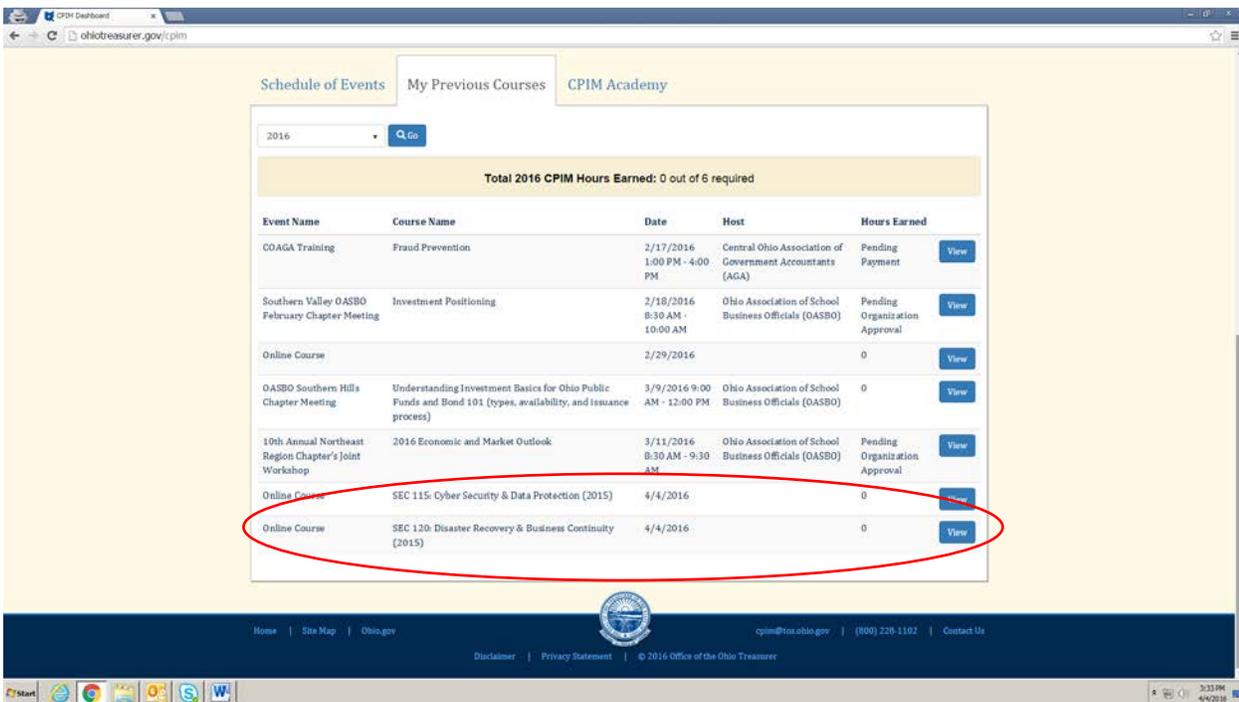
- Once you have reached the end of the course, a pop up window will appear. Click **Return** to go back to MyCPIM.



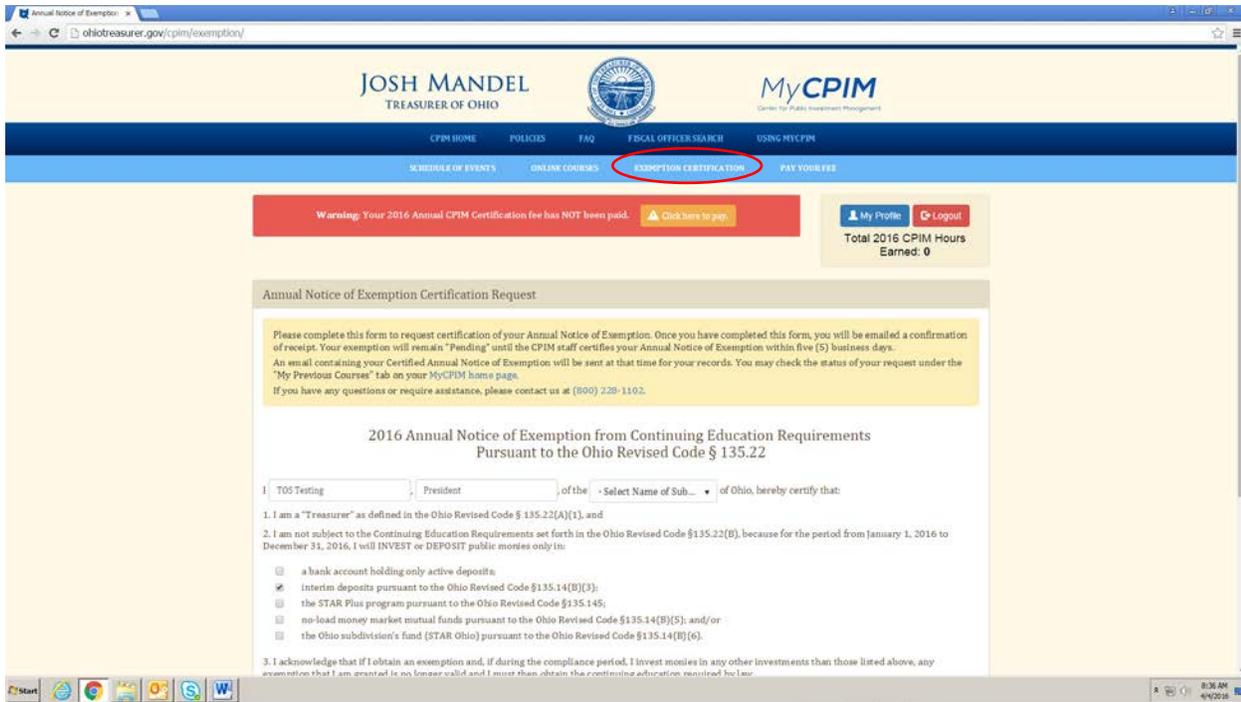
- This will take you back to the CPIM Online course library. To view your hours, first click on **CPIM HOME**.



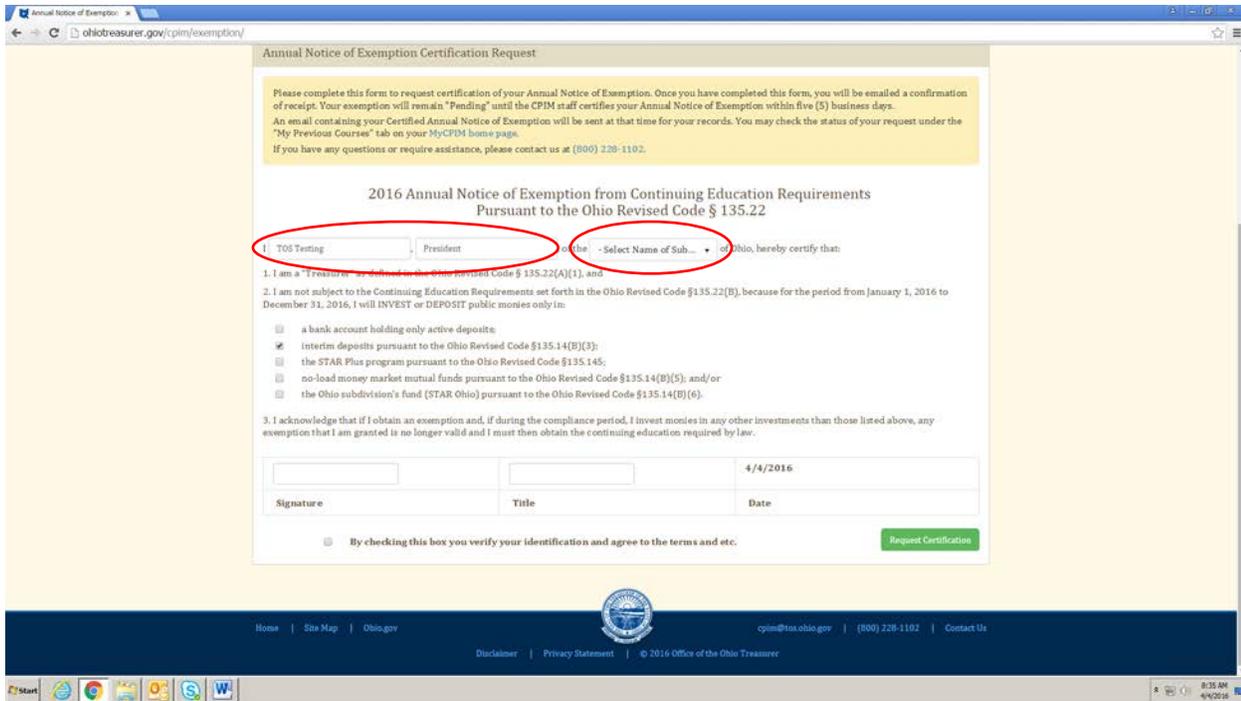
- Scroll down to **My Previous Courses** next to the **Schedule of Events**. The course will be listed with a 0 in the **Hours Earned** column until the CPIM staff has verified the hours. Once we have verified your hours, you will receive an email confirmation stating that your hours have been reported. If you have paid your fee, the number of hours earned will appear in the **Hours Earned** column. If you have not paid your fee, the hours will show as *Pending Payment* until a payment is made.



- To file an exemption, click **EXEMPTION CERTIFICATION**.



- The name and title fields will be pre-populated with the information from your profile. Select the government subdivision you want to file the exemption for by first clicking in **Select Name of Subdivision** field. This will bring up the same search and dropdown menu that appears on the **My Profile** page. To review how to select your government subdivision, review page 23.



- Designate the reasons why your government subdivision qualifies for an exemption, type in your name and title once more, check the box to certify your information, and click **Request Certification**.

Annual Notice of Exemption Certification Request

Please complete this form to request certification of your Annual Notice of Exemption. Once you have completed this form, you will be emailed a confirmation of receipt. Your exemption will remain "Pending" until the CPIM staff certifies your Annual Notice of Exemption within five (5) business days. An email containing your Certified Annual Notice of Exemption will be sent at that time for your records. You may check the status of your request under the "My Previous Courses" tab on your MyCPIM home page. If you have any questions or require assistance, please contact us at (800) 228-1102.

2016 Annual Notice of Exemption from Continuing Education Requirements Pursuant to the Ohio Revised Code § 135.22

I, TOS Testing, President, of the -Select Name of Sub- of Ohio, hereby certify that:

- I am a "Treasurer" as defined in the Ohio Revised Code § 135.22(A)(1), and
- I am not subject to the Continuing Education Requirements set forth in the Ohio Revised Code § 135.22(B), because for the period from January 1, 2016 to December 31, 2016, I will INVEST or DEPOSIT public monies only in:
 - a bank account holding only active deposits
 - interim deposits pursuant to the Ohio Revised Code § 135.14(B)(3);
 - the STAR Plus program pursuant to the Ohio Revised Code § 135.145;
 - no-load money market mutual funds pursuant to the Ohio Revised Code § 135.14(B)(5); and/or
 - the Ohio subdivision's fund (STAR Ohio) pursuant to the Ohio Revised Code § 135.14(B)(6).
- I acknowledge that if I obtain an exemption and, if during the compliance period, I invest monies in any other investments than those listed above, any exemption that I am granted is no longer valid and I must then obtain the continuing education required by law.

Signature: _____ Title: _____ Date: 4/4/2016

By checking this box you verify your identification and agree to the terms and etc.

[Request Certification](#)

NOTE: After you request certification of your exemption, you will receive an email confirmation. THIS IS NOT YOUR CERTIFIED EXEMPTION. This email is just to confirm that we have received your request. We will certify your request and you will receive a **second** email that is your certified exemption.

NOTE: If you need to request certification for more than one government subdivision, you may do so by repeating this process. Users are able to file one exemption per subdivision, per year.

- To reprint your exemption certification, click **CPIM Home**, then click **My Previous Courses**.

CPIM Dashboard

JOSH MANDEL
TREASURER OF OHIO

MyCPIM
Center for Public Investment Management

[CPIM HOME](#) | [POLICYS](#) | [FAQ](#) | [FISCAL OFFICER SEARCH](#) | [USING MYCPIM](#)

[SCHEDULE OF EVENTS](#) | [ONLINE COURSES](#) | [EXEMPTION CERTIFICATION](#) | [PAY YOUR FEE](#)

Warning: Your 2016 Annual CPIM Certification fee has NOT been paid. [Click here to pay.](#)

[My Profile](#) | [Logout](#)

Total 2016 CPIM Hours Earned: 0

Navigating MyCPIM
This web portal serves as a one-stop-shop, online reporting system to service your CPIM needs. Our goal is to make this system and your CPIM experience as simple, efficient, and convenient as possible. **Need Help?** Contact us at (800) 228-1102.

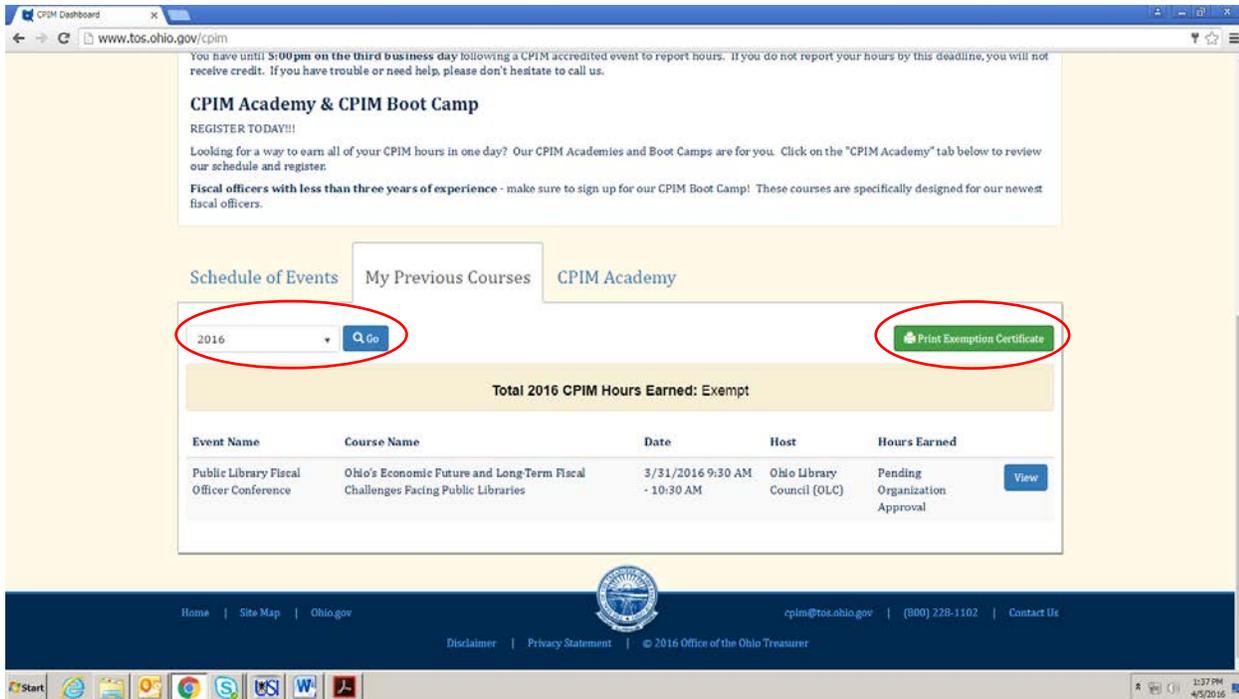
REPORTING HOURS
REMINDER!!!
You have until 5:00pm on the third business day following a CPIM accredited event to report hours. If you do not report your hours by this deadline, you will not receive credit. If you have trouble or need help, please don't hesitate to call us.

CPIM Academy & CPIM Boot Camp
REGISTER TODAY!!!
Looking for a way to earn all of your CPIM hours in one day? Our CPIM Academies and Boot Camps are for you. Click on the "CPIM Academy" tab below to review our schedule and register.
Fiscal officers with less than three years of experience - make sure to sign up for our CPIM Boot Camp! These courses are specifically designed for our newest fiscal officers.

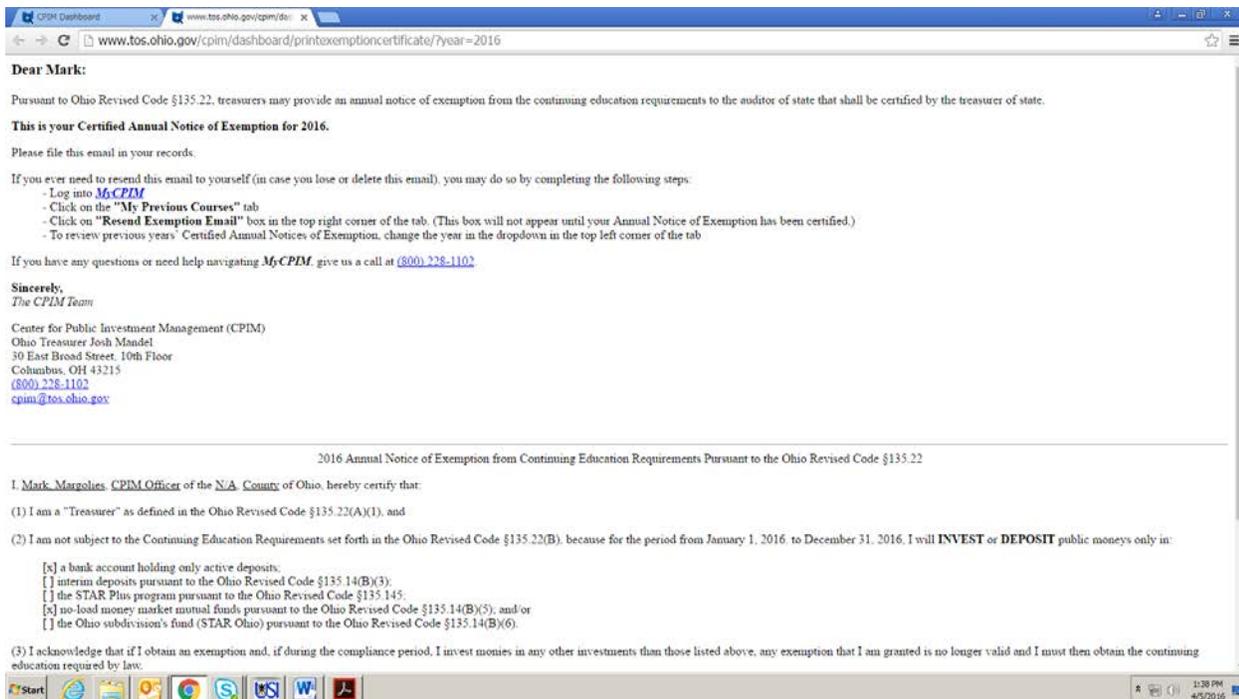
Schedule of Events | [My Previous Courses](#) | CPIM Academy

2016

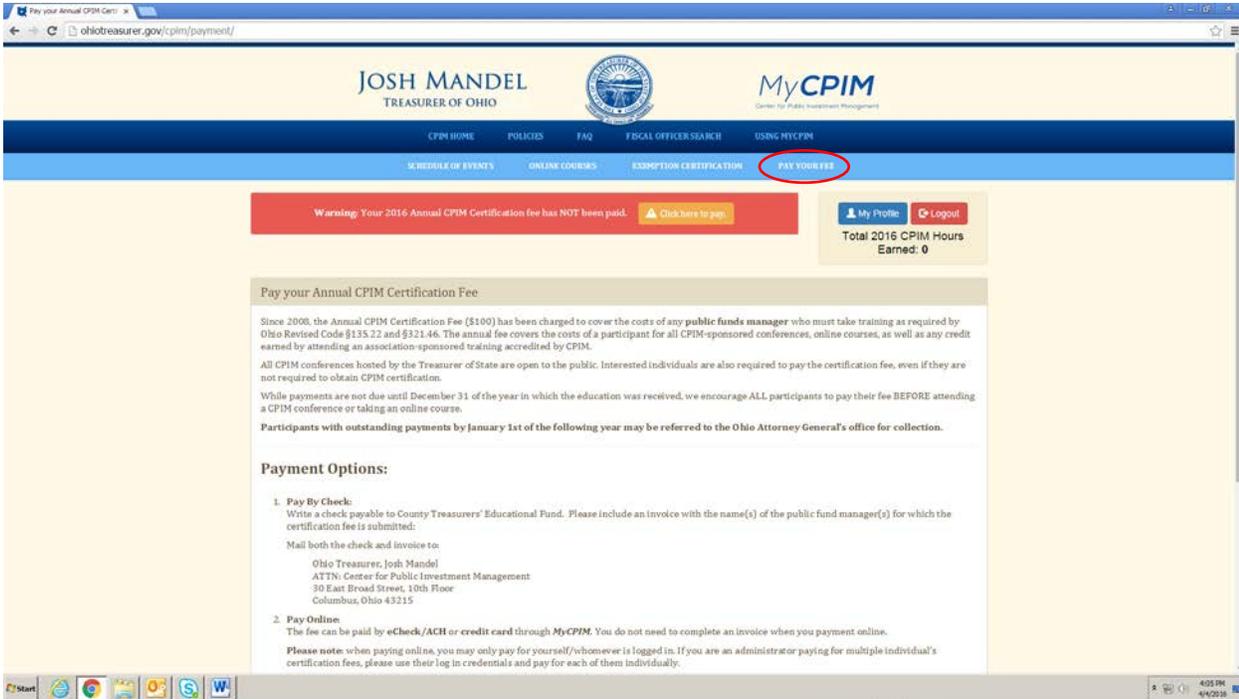
- Select the year in the dropdown box on the left, and click **Go**. You will see **Print Exemption Certificate** appear for each year that an exemption was certified. Click **Print Exemption Certificate**.



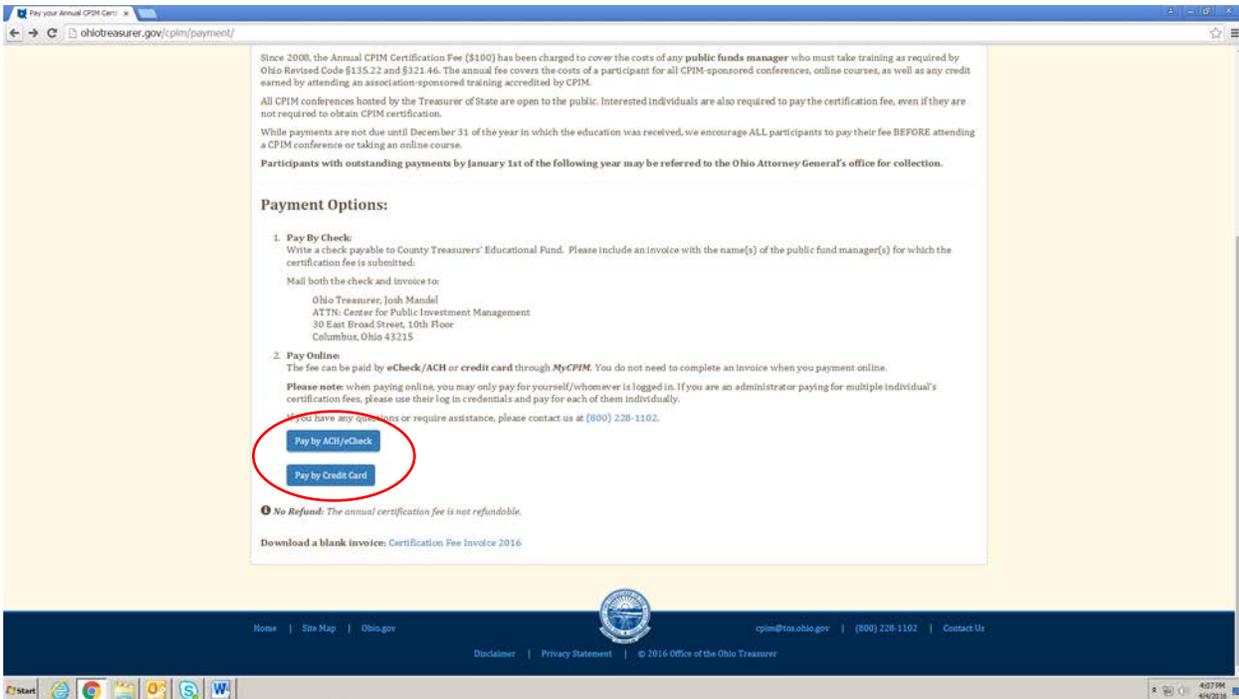
- It will open a new page with the email that was sent. You will **not** receive a new email; rather this page can be printed for the exact same purpose that the email serves.



- For payment information, click **PAY YOUR FEE**. You can now pay electronically by ACH and credit card. You can also download a blank invoice if you plan to mail in a check.



- To make a payment online, first select which method you will be using (ACH or credit card), and click on the respective button for that payment method.



- This will open our payment portal. Fill out the required information, and click **Continue**.

CBOSS Pay Bill Online

Step 1 - Enter Payment Information

Please enter your credit card payment and billing information below. All of the fields marked with an asterisk are required. The following link provides information regarding the Card Security Code.

CBOSS Payment Summary
Total: \$100.00

Payment Information

* Credit Card Number:
 * Expiration Month:
 Card Security Code:

* Credit Card Type:
 * Expiration Year:

Billing Information

First Name: TOS Middle Name:
 * Last Business Name: Testing * Phone:
 * Address Line 1: 5672 Dove Ave Address Line 2:
 * City: Bedford * State/Province/Region: OH
 * Zip/Postal Code: 44146 Country: United States
 Email: cpim@tos.ohio.gov

Continue **Cancel**

Technical Support
If you need technical support for this online payment processing application, please send an email to cpim@tos.ohio.gov.

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- Review your payment information on this screen, and click **Confirm**. Once you have confirmed your information, you will go back to MyCPIM and the screen will indicate if your payment was successful. If it was, it will immediately post to your account. If it was not, please call us at (800) 228-1102, and we can help.

CBOSS Pay Bill Online

Step 2 - Confirm Payment Information

Please confirm that your credit card payment and billing information below is correct.

CBOSS Payment Summary
Total: \$100.00

Payment Information

* Credit Card Number: 4155111111111111 * Credit Card Type: Visa
 * Expiration Month: 01 * Expiration Year: 17
 Card Security Code:

Billing Information

First Name: TOS Middle Name:
 * Last Business Name: Testing * Phone: 5555555555
 * Address Line 1: 5672 Dove Ave Address Line 2:
 * City: Bedford * State/Province/Region: OH
 * Zip/Postal Code: 44146 Country: United States
 Email: cpim@tos.ohio.gov

Confirm **Back**

Technical Support
If you need technical support for this online payment processing application, please send an email to cpim@tos.ohio.gov.

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- If paying by check, or if you need to download a blank invoice for any other reason, click **Download a blank invoice**.

Ohio Treasurer, Josh Mandel

Since 2008, the Annual CPIM Certification Fee (\$100) has been charged to cover the costs of any public funds manager who must take training as required by Ohio Revised Code §135.22 and §321.46. The annual fee covers the costs of a participant for all CPIM-sponsored conferences, online courses, as well as any credit earned by attending an association-sponsored training accredited by CPIM.

All CPIM conferences hosted by the Treasurer of State are open to the public. Interested individuals are also required to pay the certification fee, even if they are not required to obtain CPIM certification.

While payments are not due until December 31 of the year in which the education was received, we encourage ALL participants to pay their fee BEFORE attending a CPIM conference or taking an online course.

Participants with outstanding payments by January 1st of the following year may be referred to the Ohio Attorney General's office for collection.

Payment Options:

- 1. Pay By Check:**
Write a check payable to County Treasurers' Educational Fund. Please include an invoice with the name(s) of the public fund manager(s) for which the certification fee is submitted.
Mail both the check and invoice to:
Ohio Treasurer, Josh Mandel
ATTN: Center for Public Investment Management
30 East Broad Street, 10th Floor
Columbus, Ohio 43215
- 2. Pay Online:**
The fee can be paid by eCheck/ACH or credit card through MyCPIM. You do not need to complete an invoice when you payment online.
Please note: when paying online, you may only pay for yourself/whomever is logged in. If you are an administrator paying for multiple individual's certification fees, please use their log in credentials and pay for each of them individually.
If you have any questions or require assistance, please contact us at (800) 228-1102.

[Pay by ACH/eCheck](#)

[Pay by Credit Card](#)

No Refund: The annual certification fee is not refundable.

[Download a blank invoice: Certification Fee Invoice 2016](#)

Home | Site Map | Ohio.gov

cpim@trn.ohio.gov | (800) 228-1102 | Contact Us

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402.196
4/9/2016

CPIM Academy

- On the homepage, click **CPIM Academy**. This is a listing of all of the TOS hosted CPIM Academies and Boot Camps happening across the state. They are also on the **Schedule of Events**, but this tab simply provides quicker access to them.

The screenshot shows the MyCPIM homepage. At the top, there is a navigation bar with links for CPIM HOME, POLICIES, FAQ, FISCAL OFFICER SEARCH, and USING MYCPIM. A 'MyCPIM Login' button is visible in the top right. The main content area features a 'Welcome to MyCPIM' message and a list of actions users can take once logged in, such as reporting CPIM hours and registering for events. Below this, there are two tabs: 'Schedule of Events' and 'CPIM Academy', with the latter highlighted by a red circle. A table lists several CPIM events with columns for Event Name, Date, Host, and # of Hours.

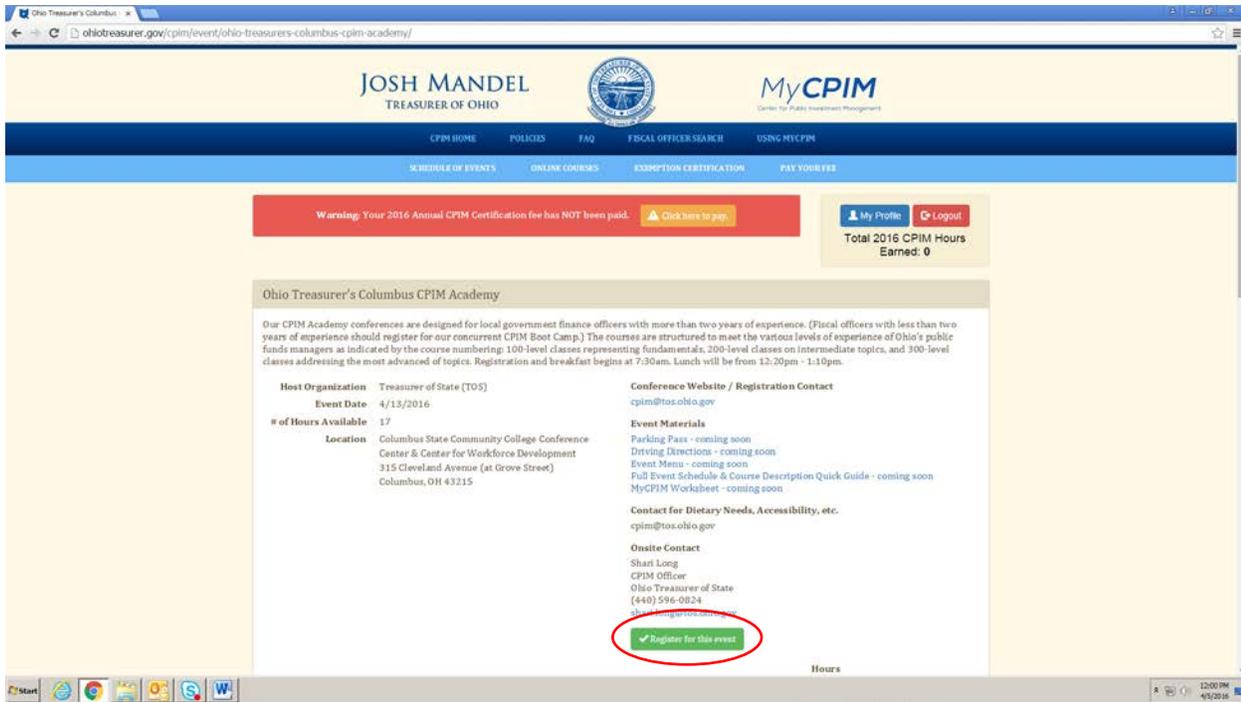
Event Name	Date	Host	# of Hours
Ohio Treasurer's Columbus CPIM Academy	4/13/2016	Treasurer of State (TOS)	17
Ohio Treasurer's Columbus CPIM Boot Camp	4/13/2016	Treasurer of State (TOS)	8
Ohio Treasurer's Findlay CPIM Academy	5/18/2016	Treasurer of State (TOS)	17
Ohio Treasurer's Findlay CPIM Boot Camp	5/18/2016	Treasurer of State (TOS)	8

- In order to register for a TOS hosted event, you must first be logged into MyCPIM. **Please review page 16 for instructions.** Once you're logged in, a green button will appear next to all TOS CPIM events. Click **Register**.

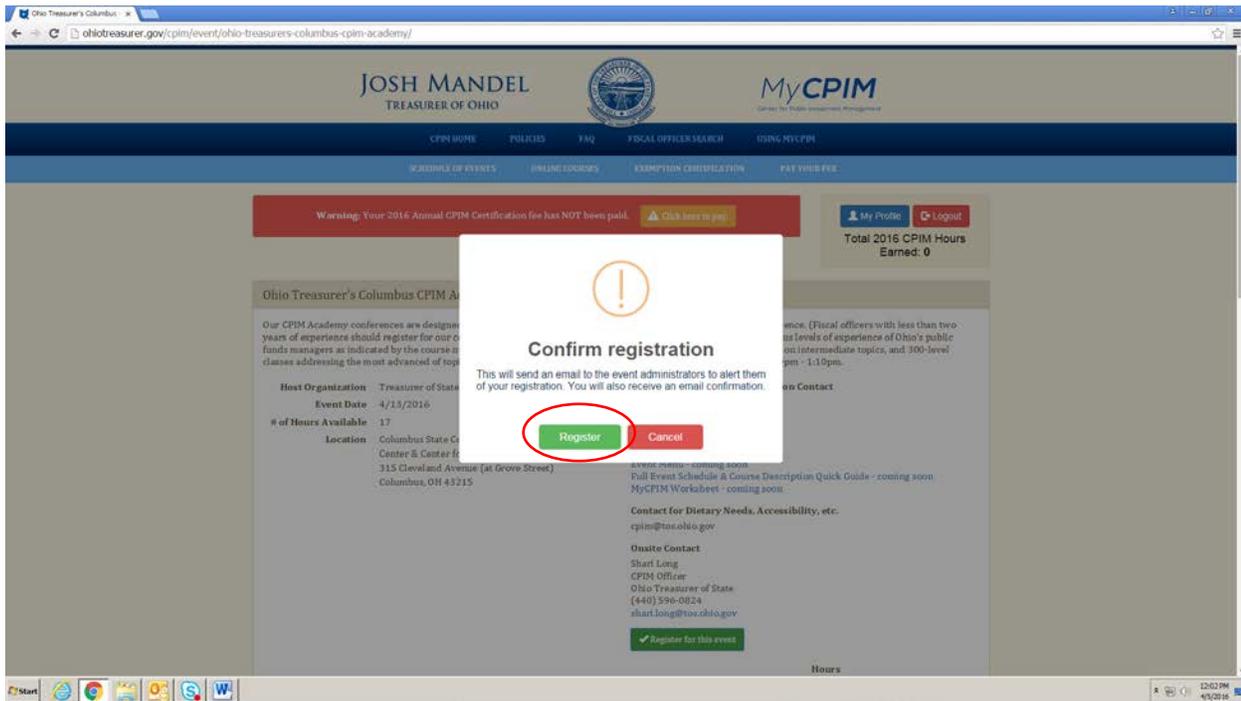
The screenshot shows the 'CPIM Academy' page after logging in. It features a 'Schedule of Events' tab and a 'CPIM Academy' tab. A message encourages users to register for events. Below, a table lists various CPIM events. Each row in the table now includes a green 'Register' button, which is highlighted with a red circle in the first row. The table columns are Event Name, Date, Host, and # of Hours.

Event Name	Date	Host	# of Hours
Ohio Treasurer's Columbus CPIM Academy	4/13/2016	Treasurer of State (TOS)	17
Ohio Treasurer's Columbus CPIM Boot Camp	4/13/2016	Treasurer of State (TOS)	8
Ohio Treasurer's Findlay CPIM Academy	5/18/2016	Treasurer of State (TOS)	17
Ohio Treasurer's Findlay CPIM Boot Camp	5/18/2016	Treasurer of State (TOS)	8
Ohio Treasurer's Cincinnati CPIM Academy	9/14/2016	Treasurer of State (TOS)	17
Ohio Treasurer's Cincinnati CPIM Boot Camp	9/14/2016	Treasurer of State (TOS)	8
Ohio Treasurer's Cleveland CPIM Academy	10/26/2016	Treasurer of State (TOS)	17
Ohio Treasurer's Cleveland CPIM Boot Camp	10/26/2016	Treasurer of State (TOS)	8

- This will take you to the event details page. Click **Register for this event**.



- Then, click Register in the pop up window.



NOTE: You'll receive a confirmation email with additional details about the event. This email will include important information about the event, but not all of the information you'll need to attend. Please continue reading for additional registration information and to find out how to access the event and course materials. Your registration confirmation will also show up on the event details screen.

- If for any reason you need to cancel your reservation, click **Unregister for this event** and confirm your request in the pop up box.

Ohio Treasurer's Columbus CPIM Academy

Our CPIM Academy conferences are designed for local government finance officers with more than two years of experience. (Fiscal officers with less than two years of experience should register for our concurrent CPIM Boot Camp.) The courses are structured to meet the various levels of experience of Ohio's public funds managers as indicated by the course numbering: 100-level classes representing fundamentals, 200-level classes on intermediate topics, and 300-level classes addressing the most advanced of topics. Registration and breakfast begins at 7:30am. Lunch will be from 12:20pm - 1:10pm.

Host Organization	Treasurer of State (TOS)	Conference Website / Registration Contact	cpim@tos.ohio.gov
Event Date	4/13/2016	Event Materials	Parking Pass - coming soon Driving Directions - coming soon Event Menu - coming soon Full Event Schedule & Course Description Quick Guide - coming soon MyCPIM Worksheet - coming soon
# of Hours Available	17	Contact for Dietary Needs, Accessibility, etc.	cpim@tos.ohio.gov
Location	Columbus State Community College Conference Center & Center for Workforce Development 315 Cleveland Avenue (at Grove Street) Columbus, OH 43215	Onsite Contact	Shari Long CPIM Officer Ohio Treasurer of State (440) 596-0824 shari.long@tos.ohio.gov

You have registered for this event.

Unregister from this event

Course Name	Date/Time	Speaker(s)	Hours Available
General Session and Market Update	4/13/2016 8:30 AM - 9:30 AM	JD Pisula, Ohio Treasurer of State, Zach Amendola, CFA, Ohio Treasurer of State	1 Report Hours View
CASH 237: Collateralized Deposits Update	4/13/2016 9:30 AM - 10:30 AM	Ashley Montgomery, Ohio Treasurer of State, Robin Williams, Ohio Treasurer of State	1 Report Hours View
INV 221: Principles of Investment Accounting	4/13/2016 9:30 AM - 10:30 AM	Dennis Yacobozzi, United American Capital Corporation, Stan Bahorek, Columbus City Schools	1 Report Hours View
TRANS 101: Why Transparency? An Introduction to OhioCheckbook.com for Local Governments	4/13/2016 9:30 AM - 10:30 AM	Frank Kohrtall, Ohio Treasurer of State, OpenGov	1 Report Hours View

- This event details page provides information about the event you'll need to attend, including registration, breakfast, and lunch times, detailed building information and driving directions, an onsite contact, who to contact for dietary/accessibility requests, and other documents for download that will help you prepare for the conference.

Ohio Treasurer's Columbus CPIM Academy

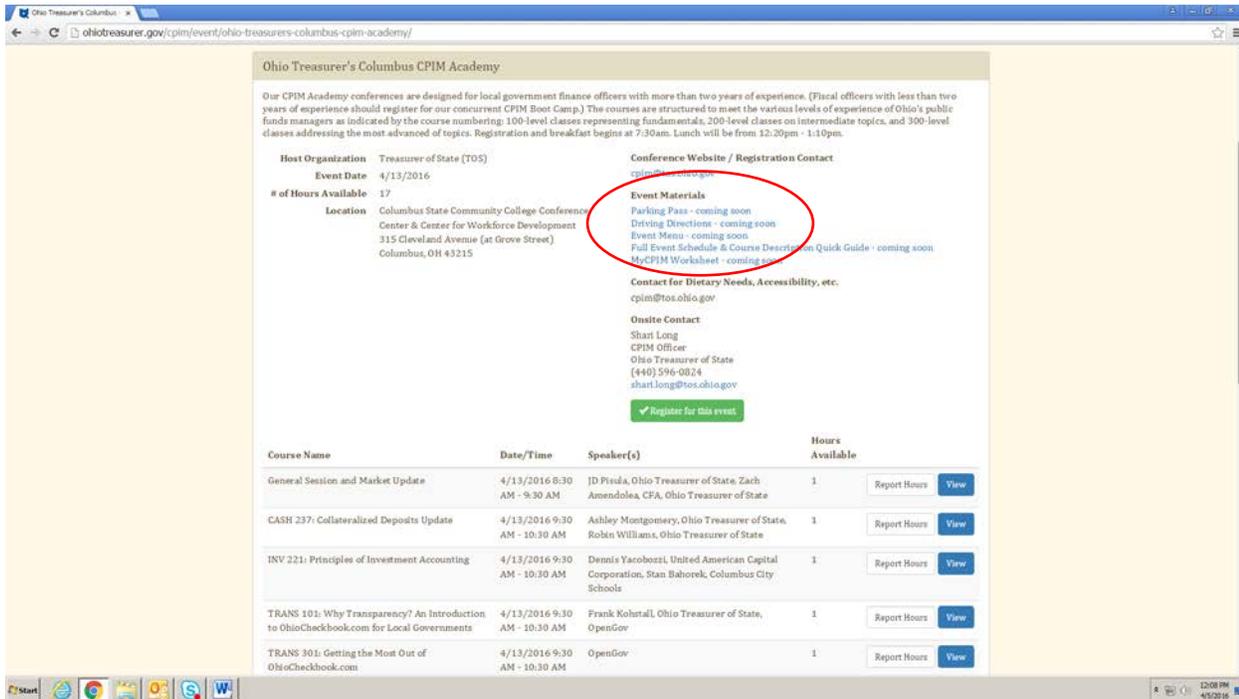
Our CPIM Academy conferences are designed for local government finance officers with more than two years of experience. (Fiscal officers with less than two years of experience should register for our concurrent CPIM Boot Camp.) The courses are structured to meet the various levels of experience of Ohio's public funds managers as indicated by the course numbering: 100-level classes representing fundamentals, 200-level classes on intermediate topics, and 300-level classes addressing the most advanced of topics. Registration and breakfast begins at 7:30am. Lunch will be from 12:20pm - 1:10pm.

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# of Hours Available	17	Contact for Dietary Needs, Accessibility, etc.	cpim@tos.ohio.gov
Location	Columbus State Community College Conference Center & Center for Workforce Development 315 Cleveland Avenue (at Grove Street) Columbus, OH 43215	Onsite Contact	Shari Long CPIM Officer Ohio Treasurer of State (440) 596-0824 shari.long@tos.ohio.gov

Register for this event.

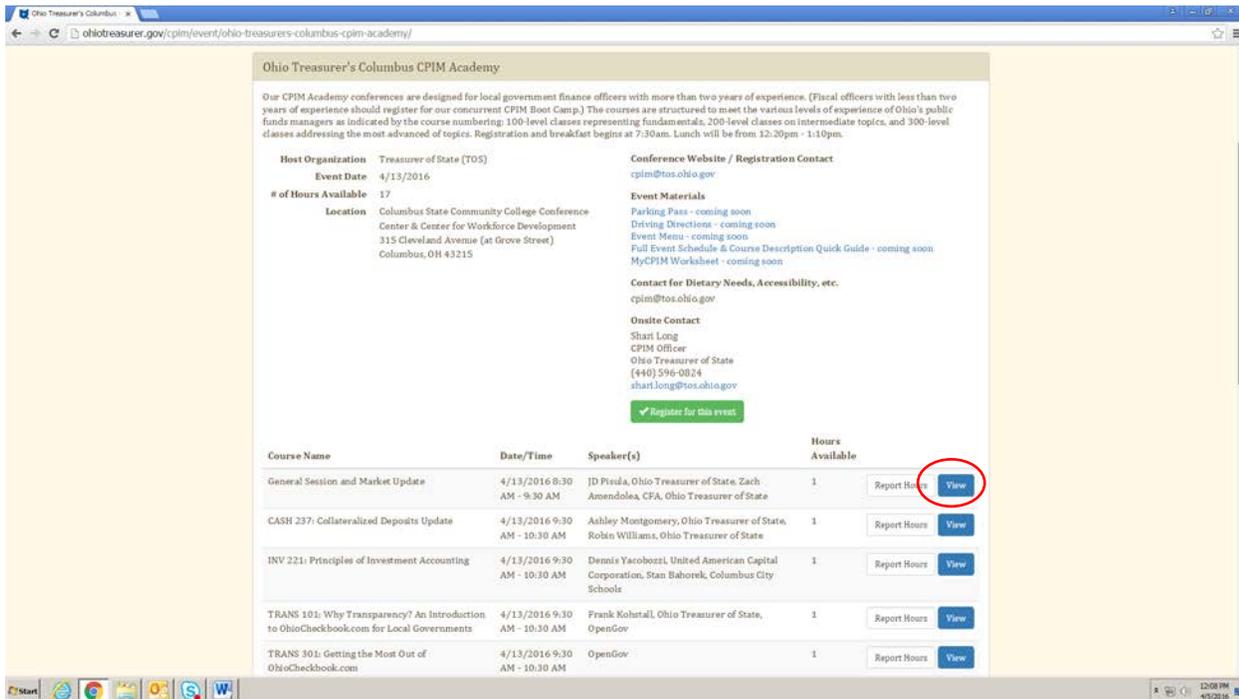
Course Name	Date/Time	Speaker(s)	Hours Available
General Session and Market Update	4/13/2016 8:30 AM - 9:30 AM	JD Pisula, Ohio Treasurer of State, Zach Amendola, CFA, Ohio Treasurer of State	1 Report Hours View
CASH 237: Collateralized Deposits Update	4/13/2016 9:30 AM - 10:30 AM	Ashley Montgomery, Ohio Treasurer of State, Robin Williams, Ohio Treasurer of State	1 Report Hours View
INV 221: Principles of Investment Accounting	4/13/2016 9:30 AM - 10:30 AM	Dennis Yacobozzi, United American Capital Corporation, Stan Bahorek, Columbus City Schools	1 Report Hours View
TRANS 101: Why Transparency? An Introduction to OhioCheckbook.com for Local Governments	4/13/2016 9:30 AM - 10:30 AM	Frank Kohrtall, Ohio Treasurer of State, OpenGov	1 Report Hours View
TRANS 301: Getting the Most Out of OhioCheckbook.com	4/13/2016 9:30 AM - 10:30 AM	OpenGov	1 Report Hours View

- The **Event Materials** are the most important documents for your conference attendance preparation. Available for download are the following: parking information, driving directions, a menu, a full schedule and course description quick guide, and the MyCPIM worksheet to help with reporting your hours. Click on each document to access.



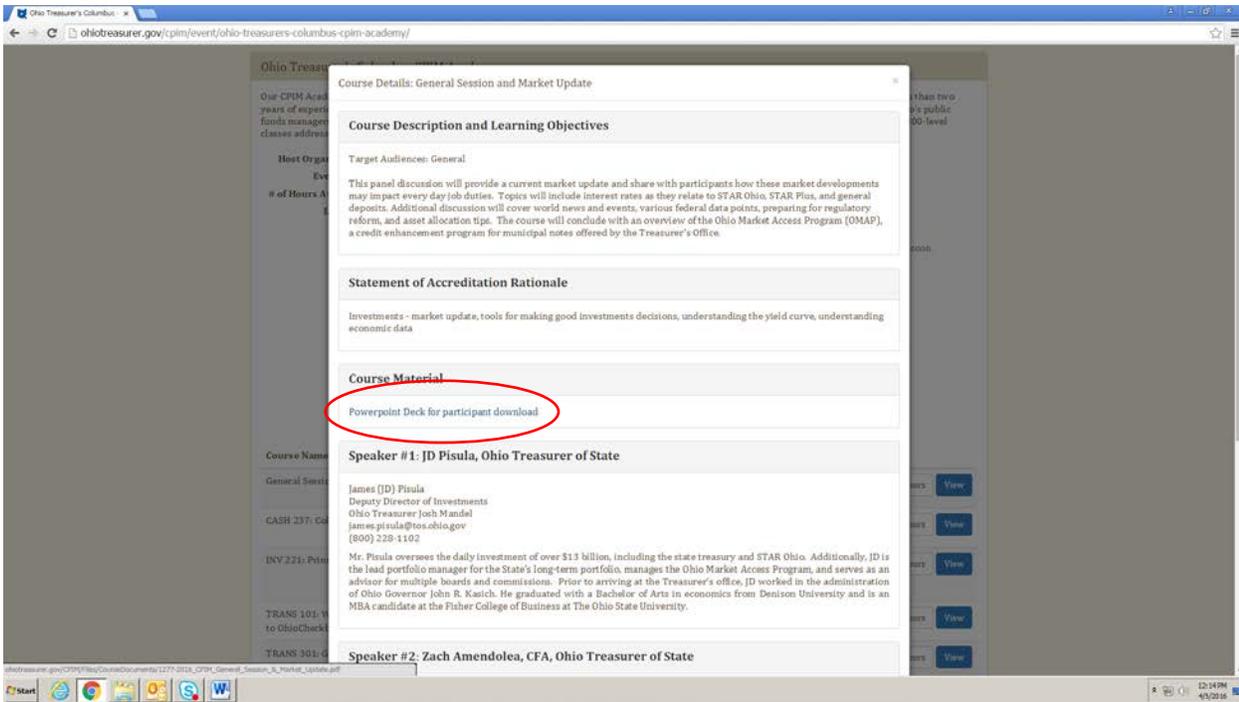
NOTE: Be sure to review all of these materials **before** attending TOS CPIM Conferences. These materials will be available no later than two business days before the conference.

- To download individual course materials ahead of time, click **View** next to each course.



NOTE: Since you are no longer required to select courses ahead of time, please review the course descriptions and schedule **before** the conference to plan for the courses you'd like to attend. You may want to select a back up option in case your first choice course is full.

- Click **PowerPoint Deck** for participant download.



NOTE: Course materials will be available no later than two business days before the conference.

Reporting Hours

- To help participants learn and adapt to the new reporting hours system, CPIM plans to distribute a MyCPIM worksheet at all CPIM accredited conferences through 2016. This worksheet includes a grid very similar to the one you've seen before on Certification of Hours forms.

Each course now has a **unique MyCPIM password** assigned to it by the organization that is hosting the event. The course password is announced during each course and is our method of ensuring that you actually attended the course you are reporting hours for. This is the biggest difference about reporting hours now through MyCPIM.

Use your MyCPIM worksheet to get in the habit of recording the information throughout the conference you'll need to report your hours through MyCPIM, such as the **number of hours you attended a course** and the **unique MyCPIM password** assigned to each course. This should make it easy to report your hours once you get back to the office.

The screenshot shows a PDF document titled "MyCPIM Worksheet" for the Ohio Library Council Training from March 31 to April 1, 2016. The document is from the Ohio Treasurer's Center for Public Investment Management and is addressed to Josh Mandel, Treasurer of Ohio. It provides instructions for reporting hours through the MyCPIM system. A table is included with the following columns: Date, Course Name, No. Minutes, No. Attended, and Password. The table contains several rows of course information, with a red circle highlighting the table area.

Date	Course Name	No. Minutes	No. Attended	Password
March 31				
4:00am - 10:00am	Ohio's Common Future and Long-Term Fiscal Challenges Facing Public Libraries	1.0		
10:00am - 11:00am	Financial Literacy	1.0		
11:00am - 12:00pm	Public Library Performance	1.0		
12:00pm - 1:00pm	Non-Profit Finance	1.0		
April 1				
8:00am - 10:00am	Service Administration	2.0		
10:00am - 12:00pm	Public Investment Strategies	2.0		
12:00pm - 1:00pm	Electronic Government - eG2016	1.0		
1:00pm - 2:00pm	Ohio Ethics Law: Can I Be Trust?	1.0		

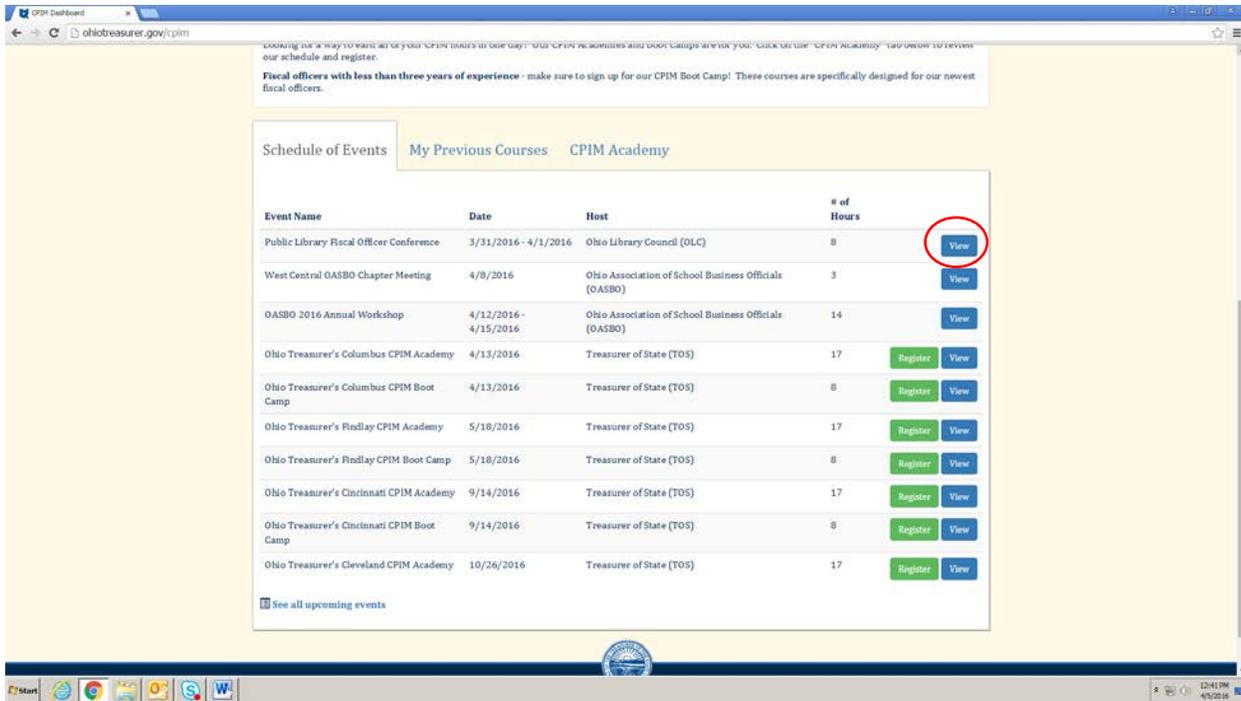
NOTE: MyCPIM is mobile friendly. We encourage you to report your hours on the fly right from your mobile phone or tablet, if you have either with you at the conference, so that there's nothing more to do once you leave the conference. Continue reading for instructions.

NOTE: If for any reason, you miss more than 10 minutes of instruction for personal or business needs, you are obligated to account for the missed time when reporting your hours. For example, if you make a phone call that lasts 15 minutes in the middle of a 1.5 hour session, you should report 1.25 hours.

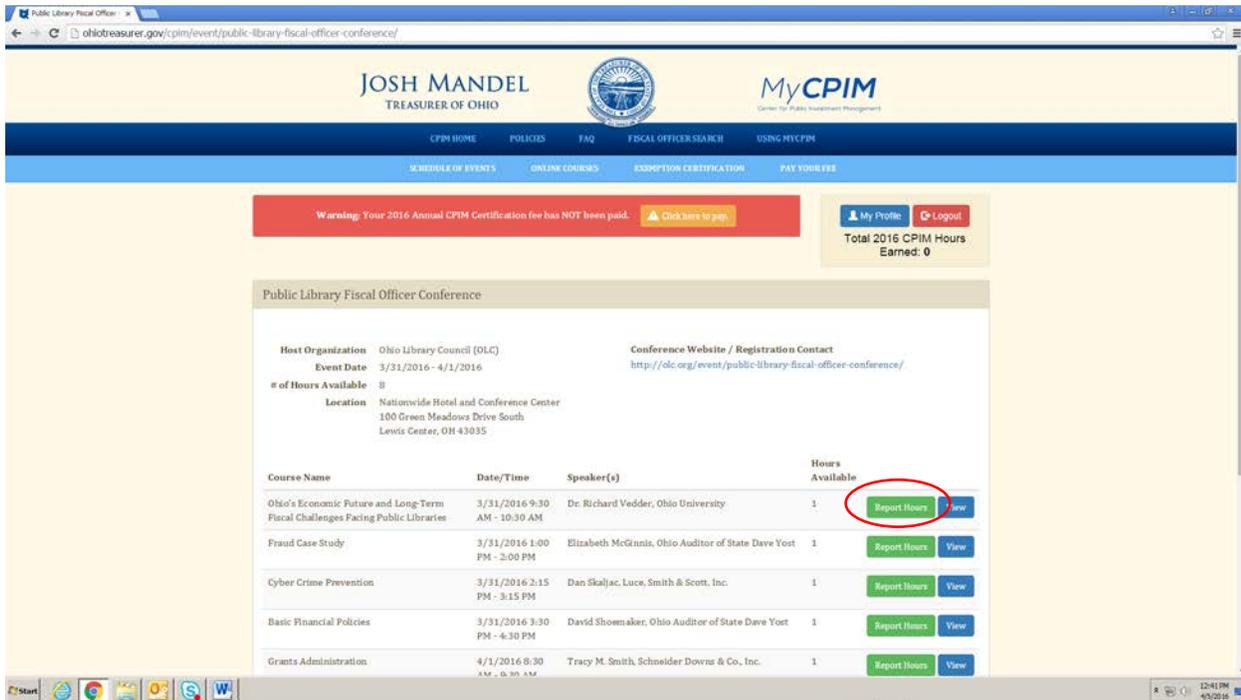
NOTE: The window to report your hours is once the course is complete until 5:00pm on the third business day following the conference close. For example, for hours earned at a conference that goes from Thursday, March 31st to Friday, April 1st – you have until Wednesday, April 6th to report those hours – even hours earned on Thursday the 31st because the window for all of the event's courses goes until April 6th. Continue reading for instructions.

NOTE: If a course password is not announced, be sure to ask for it before you leave. Obviously, please do not share the password with anyone who did not attend the course.

- To report hours, you must be logged into MyCPIM. **Please review page 16 for instructions.** On the homepage, find the event you want to report hours for on the **Schedule of Events**, and click **View**. It should be close to/at the top.



- **Report Hours** appears next to each course that is green if the report hours window is open, white if it is closed.



NOTE: The window to report your hours is once the course is complete until 5:00pm on the third business day following the conference close. For example, for hours earned at a conference that goes from Thursday, March 31st to Friday, April 1st – you have until Wednesday, April 6th to report those hours – even hours earned on Thursday the 31st because the window for all of the event's courses goes until April 6th.

- When you click **Report Hours**, it will open a form requiring various bits of information. First, use the dropdown to enter the number of hours (**Credits**) you attended. The maximum number available is listed above the dropdown.

The screenshot shows a web browser window with the URL ohiotreasurer.gov/cpim/event/report-hours/ohios-economic-future-and-long-term-fiscal-challenges-facing-public-libraries/. The page title is "You are reporting hours for Ohio's Economic Future and Long-Term Fiscal Challenges Facing Public Libraries". The form contains the following fields:

- Event Date: 3/31/2016 - 4/1/2016
- Course Date/Time: 3/31/2016 9:30 AM - 10:30 AM
- Your Name: TOS Testing
- Your Email: cpim@tos.ohio.gov
- Credits: A dropdown menu with "0.00" selected and a red "Max: 1" label next to it. This field is circled in red.
- What is the password?: An empty text input field.
- How well did the presenter explain the course content?: A dropdown menu with "- Select -" selected.
- Comments: A large text area.
- How well did the course achieve its stated objectives?: A dropdown menu with "- Select -" selected.
- Comments: A large text area.
- Was the content of this session applicable to your work for your entity?: A dropdown menu with "- Select -" selected.
- Comments: A large text area.

NOTE: If for any reason, you miss more than 10 minutes of instruction for personal or business needs, you are obligated to account for the missed time when reporting your hours. For example, if you make a phone call that lasts 15 minutes in the middle of a 1.5 hour session, you should report 1.25 hours.

- Enter the MyCPIM password that was announced during the course into the **What is the password?** field.

This screenshot is identical to the one above, showing the same form fields. In this version, the "What is the password?" text input field is circled in red.

NOTE: If a course password is not announced, be sure to ask for it before you leave. Obviously, please do not share the password with anyone who did not attend the course.

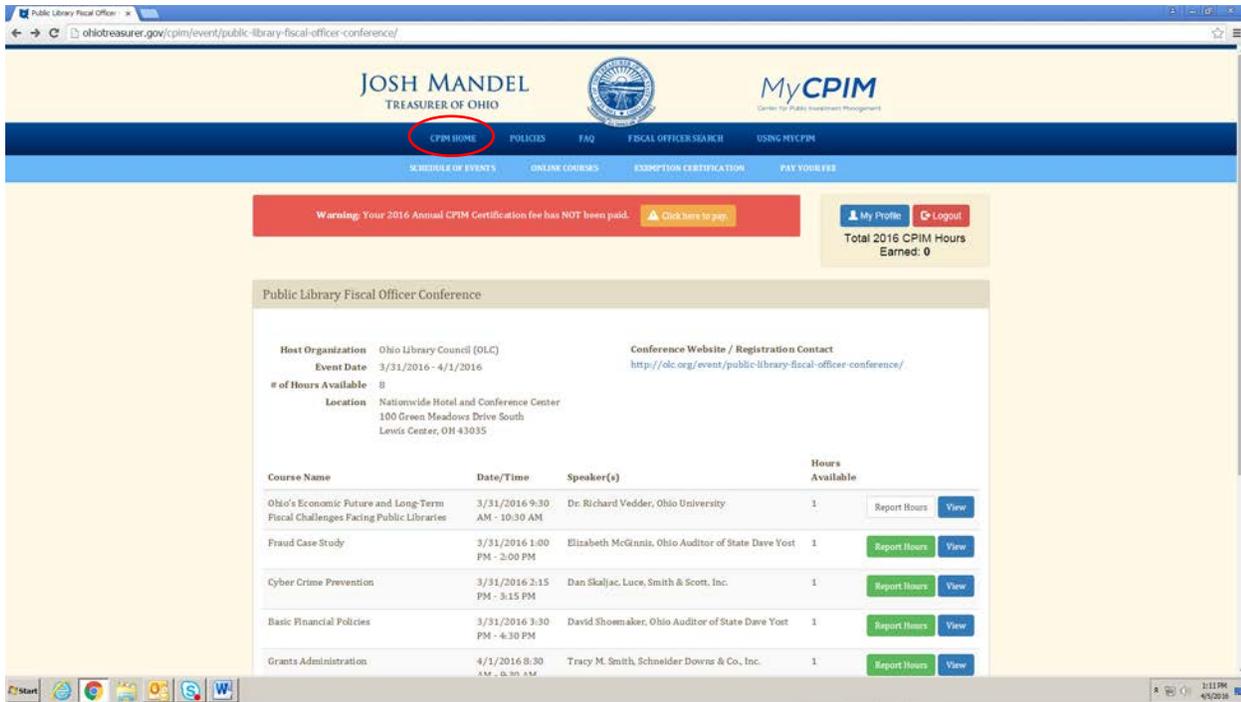
- Fill out the survey, and click **Report Hours**.

- If done successfully, a green box will pop up in the bottom right-hand corner saying that your hours have been reported, the Report Hours button for that course will turn white, and you will receive an email for each course you report hours for. **You must repeat this process for every course you want to report hours for.**

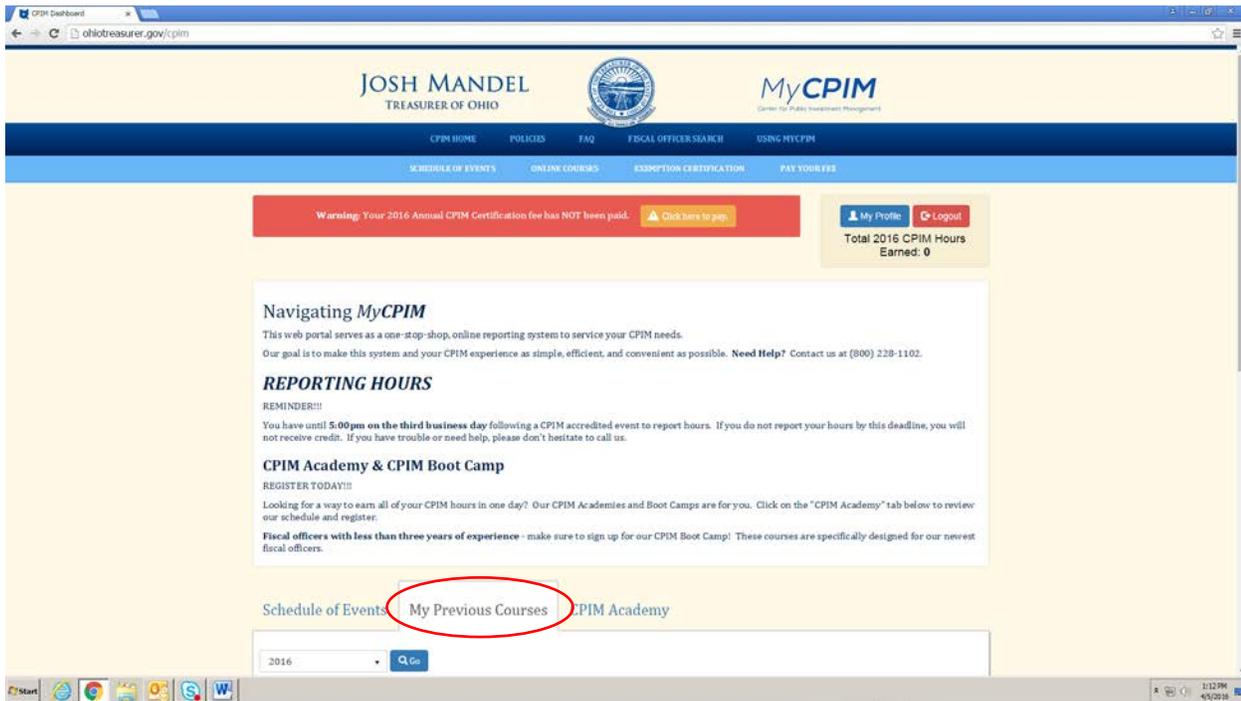
Course Name	Date/Time	Speaker(s)	Hours Available	Report Hours	View
Ohio's Economic Future and Long Term Fiscal Challenges Facing Public Libraries	3/31/2016 9:30 AM - 10:30 AM	Dr. Richard Vedder, Ohio University	1	Report Hours	View
Fraud Case Study	3/31/2016 1:00 PM - 2:00 PM	Elizabeth McGinnis, Ohio Auditor of State Dave Yost	1	Report Hours	View
Cyber Crime Prevention	3/31/2016 2:15 PM - 3:15 PM	Dan Skaljic, Luca, Smith & Scott, Inc.	1	Report Hours	View
Basic Financial Policies	3/31/2016 3:30 PM - 4:30 PM	David Shoemaker, Ohio Auditor of State Dave Yost	1	Report Hours	View
Grants Administration	4/1/2016 8:30 AM - 9:30 AM	Tracy M. Smith, Schneider Downs & Co., Inc.	1	Report Hours	View

NOTE: You can start reporting hours right after each course ends, just not for any courses that haven't occurred yet. So as each conference progresses, the Report Hours buttons will start to turn green.

- The hours will also show up on your MyCPIM homepage. Click **CPIM Home** to go back to the homepage.



- Scroll down and click **My Previous Courses**.



- All of the hours that you report appear with their status as **Pending Organization Approval**, until the host organization approves your hours.

The screenshot shows the CPIM Dashboard for the year 2016. At the top, it displays "Total 2016 CPIM Hours Earned: 0 out of 6 required". Below this is a table with the following columns: Event Name, Course Name, Date, Host, and Hours Earned. The table lists several events, including COAGA Training, Southern Valley OASBO February Chapter Meeting, and various online courses. The status for the COAGA Training event is "Pending Payment", while the status for the Southern Valley OASBO February Chapter Meeting and the Public Library Fiscal Officer Conference is "Pending Organization Approval". The "Pending Organization Approval" status is circled in red.

Event Name	Course Name	Date	Host	Hours Earned
COAGA Training	Fraud Prevention	2/17/2016 1:00 PM - 4:00 PM	Central Ohio Association of Government Accountants (AGA)	Pending Payment
Southern Valley OASBO February Chapter Meeting	Investment Positioning	2/18/2016 8:30 AM - 10:00 AM	Ohio Association of School Business Officials (OASBO)	Pending Organization Approval
Online Course		2/29/2016		0
OASBO Southern Hills Chapter Meeting	Understanding Investment Basics for Ohio Public Funds and Bond 101 (types, availability, and issuance process)	3/9/2016 9:00 AM - 12:00 PM	Ohio Association of School Business Officials (OASBO)	0
10th Annual Northeast Region Chapter's Joint Workshop	2016 Economic and Market Outlook	3/11/2016 8:30 AM - 9:30 AM	Ohio Association of School Business Officials (OASBO)	Pending Organization Approval
Public Library Fiscal Officer Conference	Ohio's Economic Future and Long-Term Fiscal Challenges Facing Public Libraries	3/31/2016 9:30 AM - 10:30 AM	Ohio Library Council (OLC)	Pending Organization Approval
Online Course	SEC 115: Cyber Security & Data Protection (2015)	4/4/2016		Pending Payment
Online Course	SEC 120: Disaster Recovery & Business Continuity (2015)	4/4/2016		0

NOTE: This is the second way we know if you have reported legitimate hours. The host organization is required to approve your attendance at the event – so be sure to sign in however they ask you to.

- Once the organization verifies your attendance, the status will change to either **Pending Payment** if you still need to pay your fee or the number of hours earned if your payment has been received. Once your fee is paid, the status will turn to a number in the **Hours Earned** and your earned hours will start accruing at the top of the list, so that you can track how many you have earned towards your annual requirement.

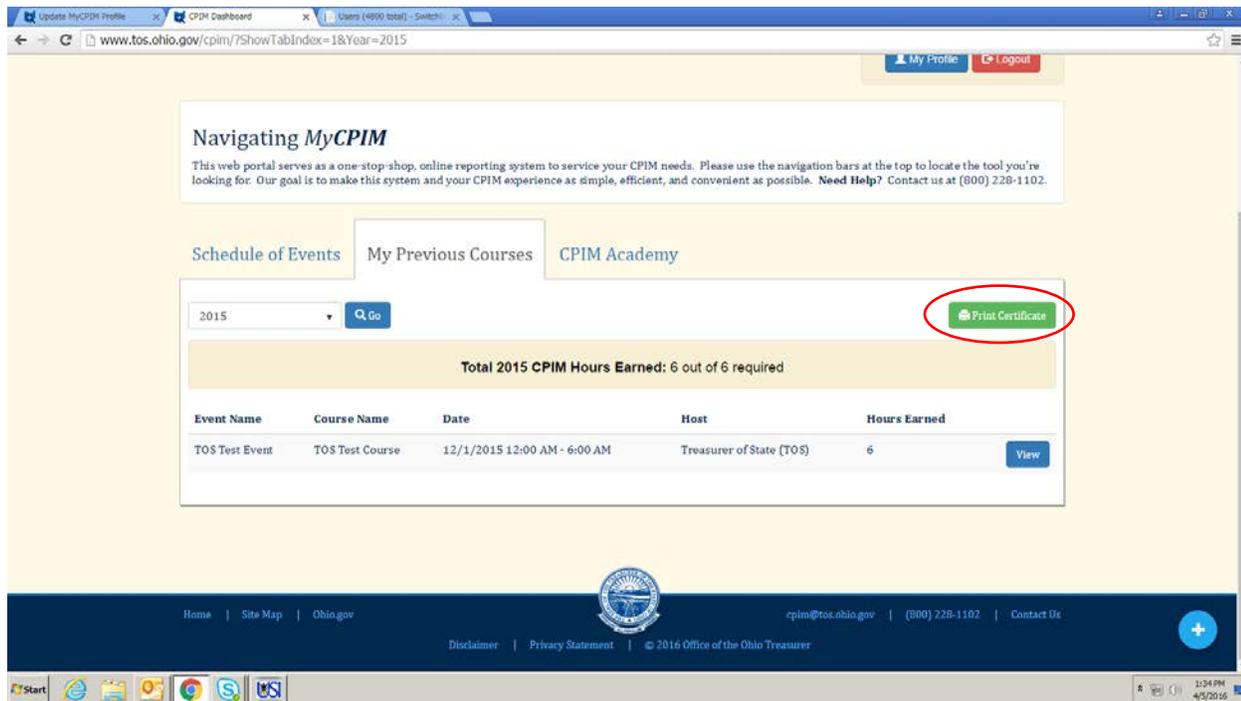
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Online Course	SEC 115: Cyber Security & Data Protection (2015)	4/4/2016		Pending Payment
Online Course	SEC 120: Disaster Recovery & Business Continuity (2015)	4/4/2016		0

NOTE: If you do not pay your fee by the end of the year, the hours will be **denied**.

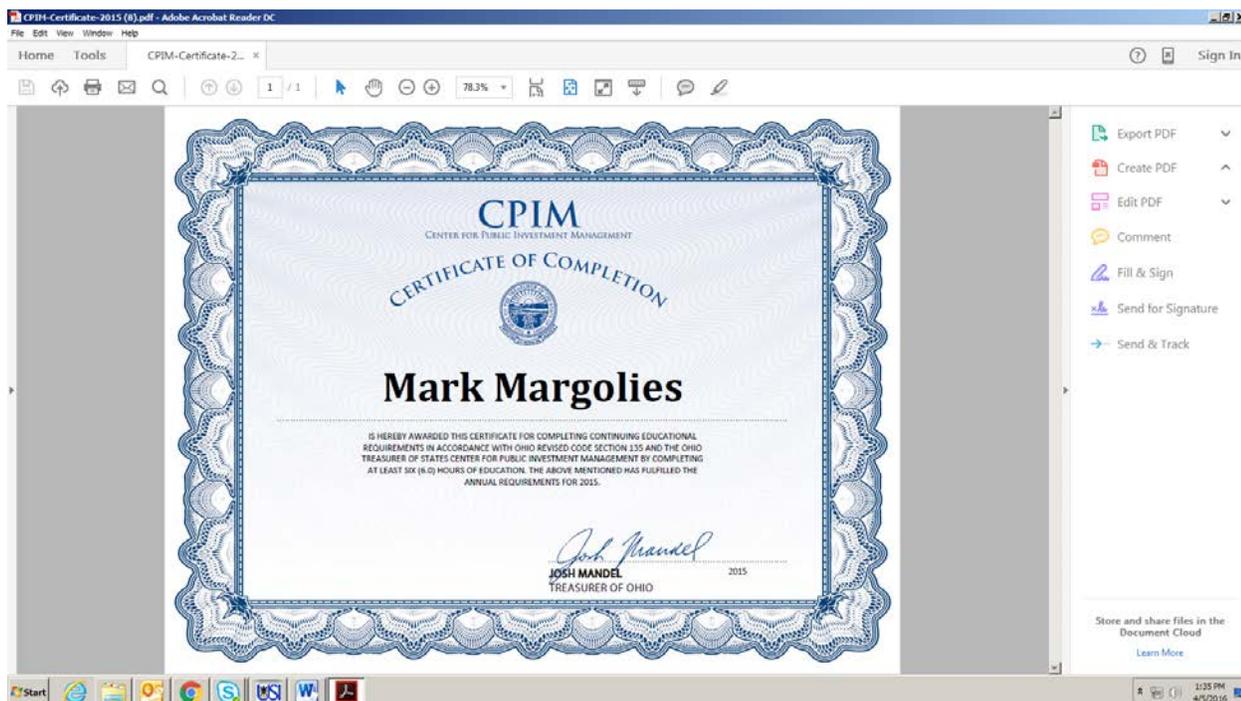
Printing a Certificate of Completion

- Once you have met your annual requirements, **Print Certificate** will appear.

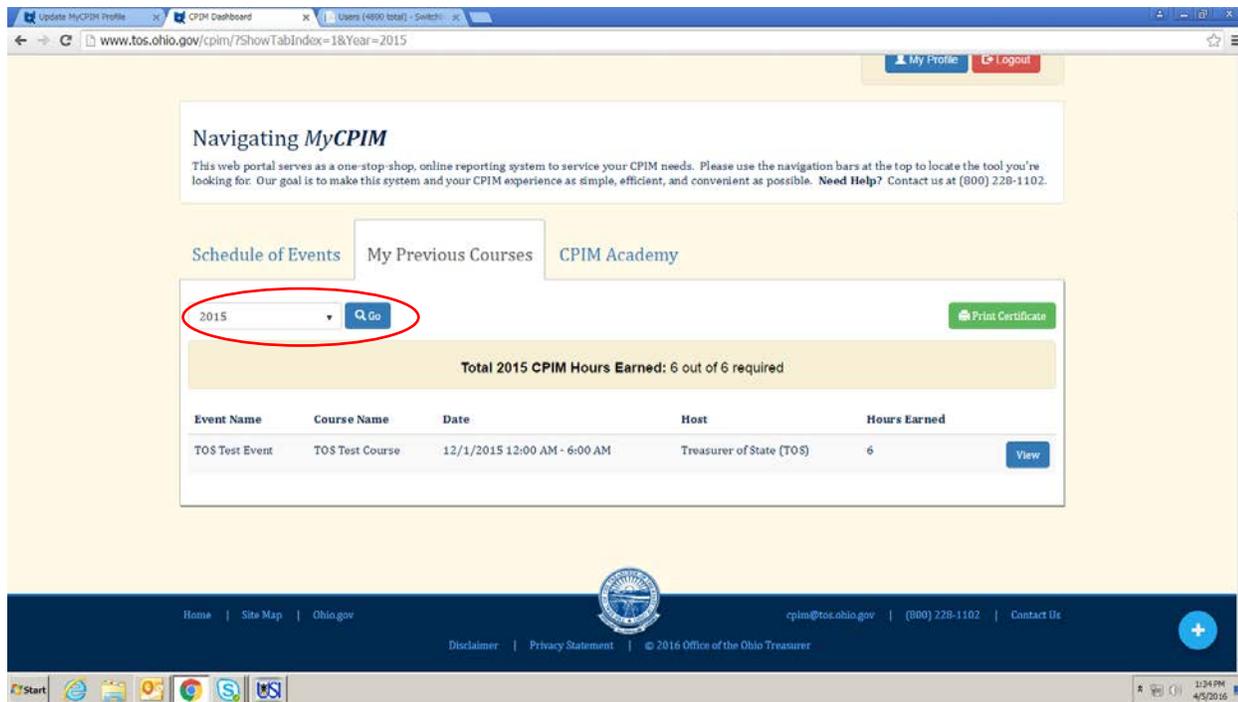


NOTE: Your annual requirements include paying your annual fee and earning at least six hours. Hours are only considered earned once they show a number in the **Hours Earned** column (no pending statuses).

- Click **Print Certificate**. It will download as a PDF you can either print or save electronically.



- To download past years' certificates, select the year you'd like to review in the dropdown, and click **Go**.



NOTE: MyCPIM stores up to five full calendar years of history.

FAQs

Coming soon

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