

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

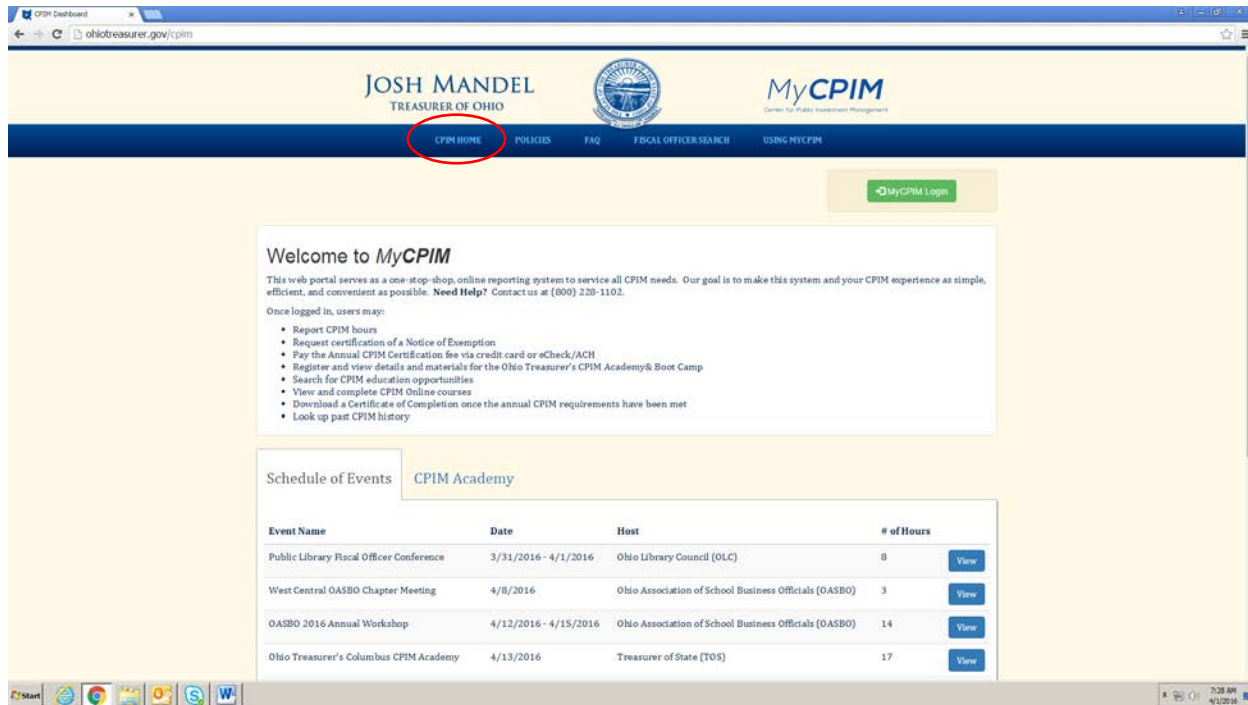
This manual is written so that the reader may print it and follow along as they learn to navigate MyCPIM.

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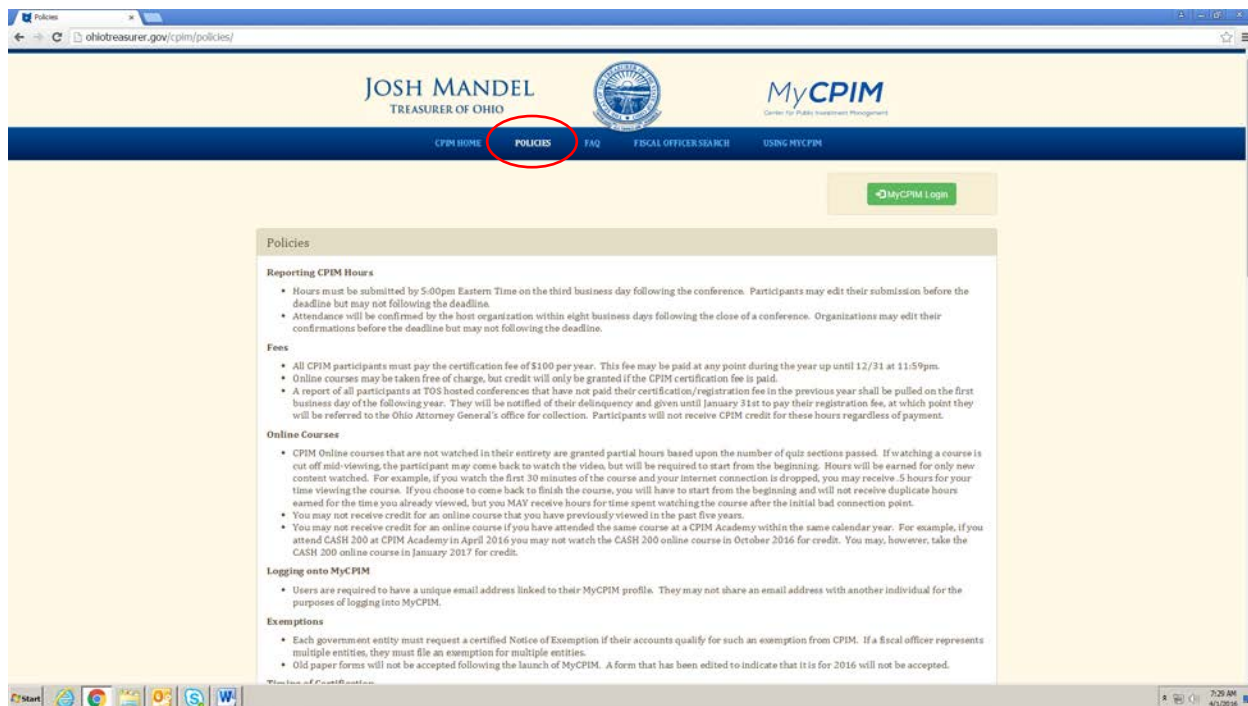
Dark Blue Navigation Bar

- 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**.

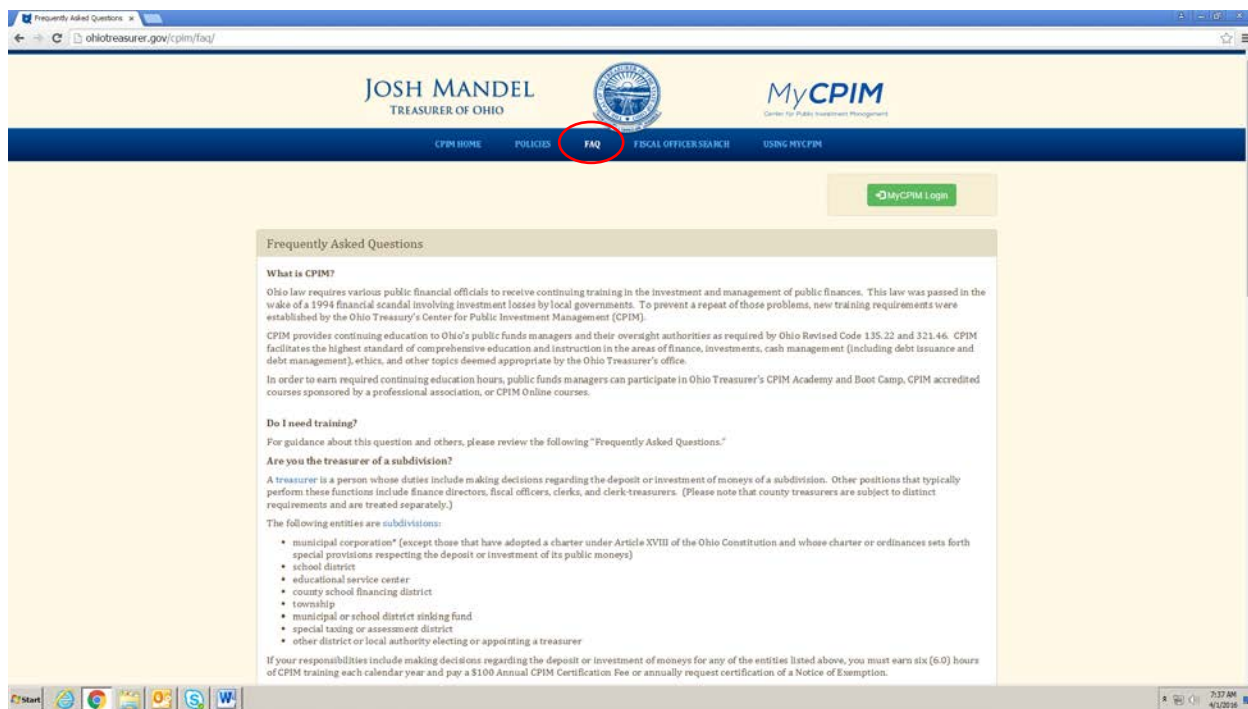


NOTE: The site works best in Google Chrome or Firefox. Please let us know of any malfunctions you experience using other browsers.

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

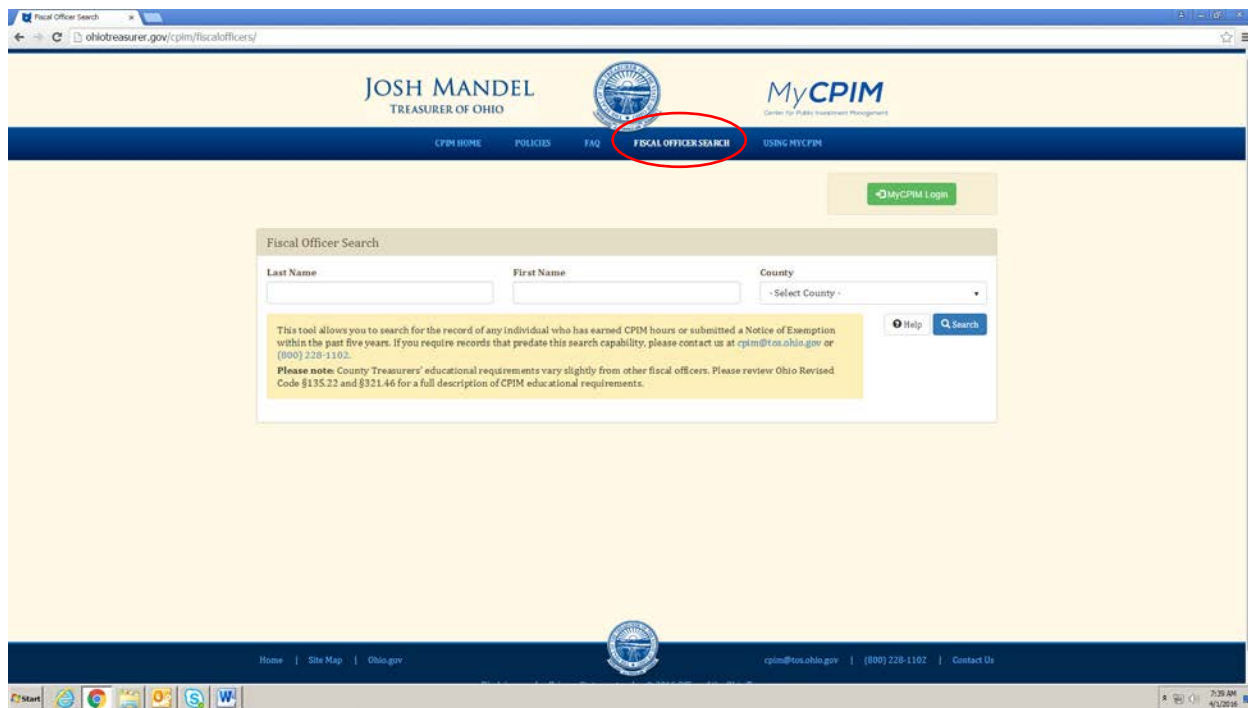


- If you have questions about the CPIM program, they may be answered after clicking **FAQ**.



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**.

The screenshot shows the 'Fiscal Officer Search' interface. At the top, there are logos for 'JOSH MANDEL TREASURER OF OHIO' and 'MyCPIM'. Below these are navigation links: 'CPIM HOME', 'POLICIES', 'FAQ', 'FISCAL OFFICER SEARCH', and 'USING MYCPIM'. A 'MyCPIM Login' button is in the top right. The search form has three fields: 'Last Name' (containing 'long'), 'First Name', and 'County' (with a dropdown menu). A 'Search' button is to the right of the 'County' field. Below the form, there is a text box explaining the search tool's purpose and a note about educational requirements. The bottom of the page has a footer with 'Home', 'Site Map', 'Ohio.gov', and contact information.

- 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.

The screenshot shows the search results page. At the top, there is a text box explaining the search tool's purpose and a note about educational requirements. Below this is a table with the following columns: 'Name', 'County', 'Government Sub-division', 'Year', and 'Hours Earned'. The table contains 20 rows of data. The entry 'Longwill, Ryan' is highlighted with a red circle. At the bottom right of the table, there are page navigation buttons: '1', '2', 'Next', and 'Last'. The '1' button is highlighted with a red circle. Below the table, it says '36 results (x) found'.

Name	County	Government Sub-division	Year	Hours Earned
Long, Shari	Cuyahoga	Treasurer of State of Ohio	2016	Exempt
Long, Cary	Wood	Grand Rapids Township	2015	Exempt
Long, Cassie	Ross	Deerfield Township	2015	Exempt
Long, Jeffery	Putnam	Liberty Township	2015	Exempt
Long, Katherine	Wayne	Wayne County Public Library	2015	11
Long, Molly	Licking	Franklin Township	2015	Exempt
Long, Shari	Cuyahoga	Treasurer of State of Ohio	2015	Exempt
Long, Tony	Ashtabula	Geneva Township	2015	6
Longwill, Ryan	Cuyahoga	Cuyahoga Metropolitan Housing Authority	2015	6.5
Long, Cary	Wood	Grand Rapids Township	2014	Exempt
Long, Cassie	Ross	Deerfield Township	2014	Exempt
Long, Jeffery	Putnam	Liberty Township	2014	Exempt
Long, Katherine	Wayne	Wayne County Public Library	2014	11
Long, Molly	Licking	Franklin Township	2014	Exempt
Long, Shari	Cuyahoga	Treasurer of State of Ohio	2014	Exempt
Long, Tony	Lake	Madison Fire District	2014	6
Long, Cary	Wood	Grand Rapids Township	2013	Exempt
Long, Cassie	Ross	Deerfield Township	2013	Exempt
Long, Jeffery	Putnam	Liberty Township	2013	Exempt
Long, Katherine	Wayne	Wayne County Public Library	2013	10

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

JOSH MANDEL
TREASURER OF OHIO

MyCPIM
Central Public Government Management

CPIM HOME POLICIES FAQ FISCAL OFFICER SEARCH **USING MYCPIM**

[MyCPIM Login](#)

Welcome to MyCPIM

This web portal serves as a one-stop-shop, online reporting system to service all 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.

Once logged in, users may:

- 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

Schedule of Events

CPIM Academy

Event Name	Date	Host	# of Hours	
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

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 website interface. At the top, there is a header with the Ohio Treasurer's Office logo and the MyCPIM logo. Below the header, there is a navigation bar with links to CPIM HOME, POLICIES, FAQ, FISCAL OFFICER SEARCH, and USING MYCPIM. A green button labeled "MyCPIM Login" is located on the right side of the header. The main content area features a "Welcome to MyCPIM" message and a list of user actions. Below this, there are two tabs: "Schedule of Events" (which is circled in red) and "CPIM Academy". The "Schedule of Events" tab displays a table with the following data:

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 next to the number of hours.

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 one above, showing the MyCPIM website with the "Schedule of Events" tab selected. The table of events is the same. In this image, the "View" button for the "Ohio Treasurer's Columbus CPIM Academy" row is circled in red, highlighting the action to click for more information.

- 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 12:30pm - 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	

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.

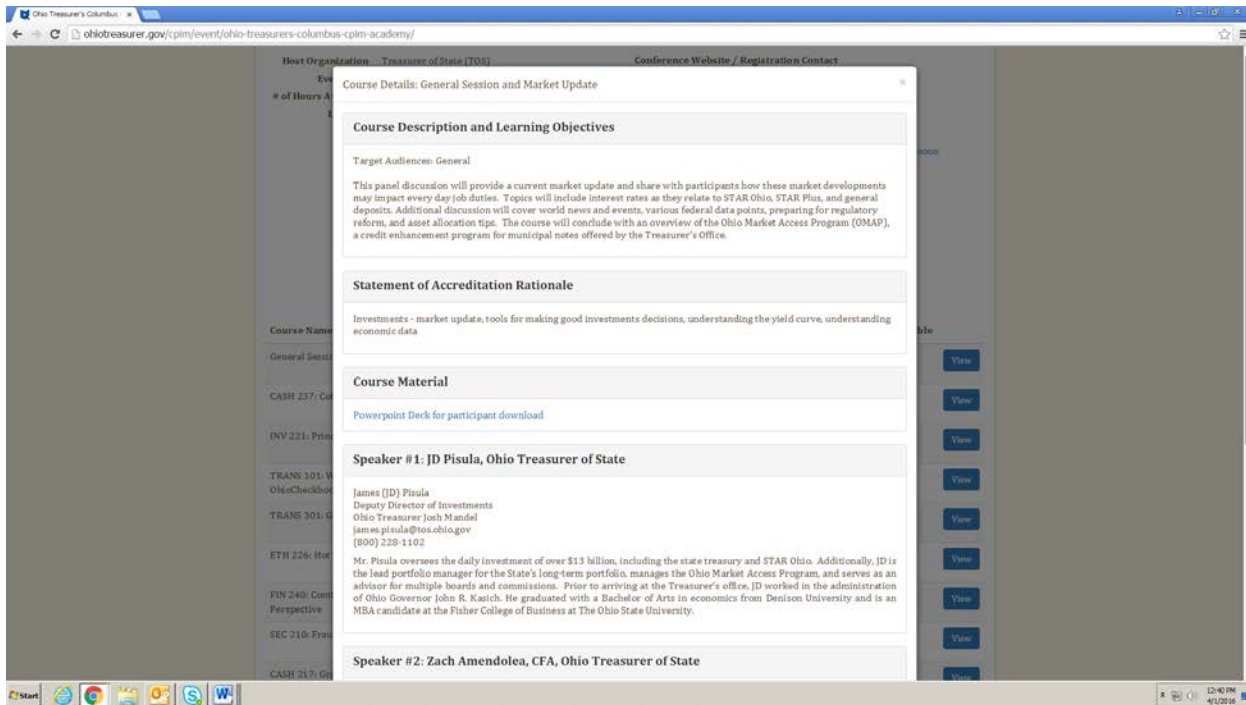
Ohio Treasurer's Columbus CPIM Academy

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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	

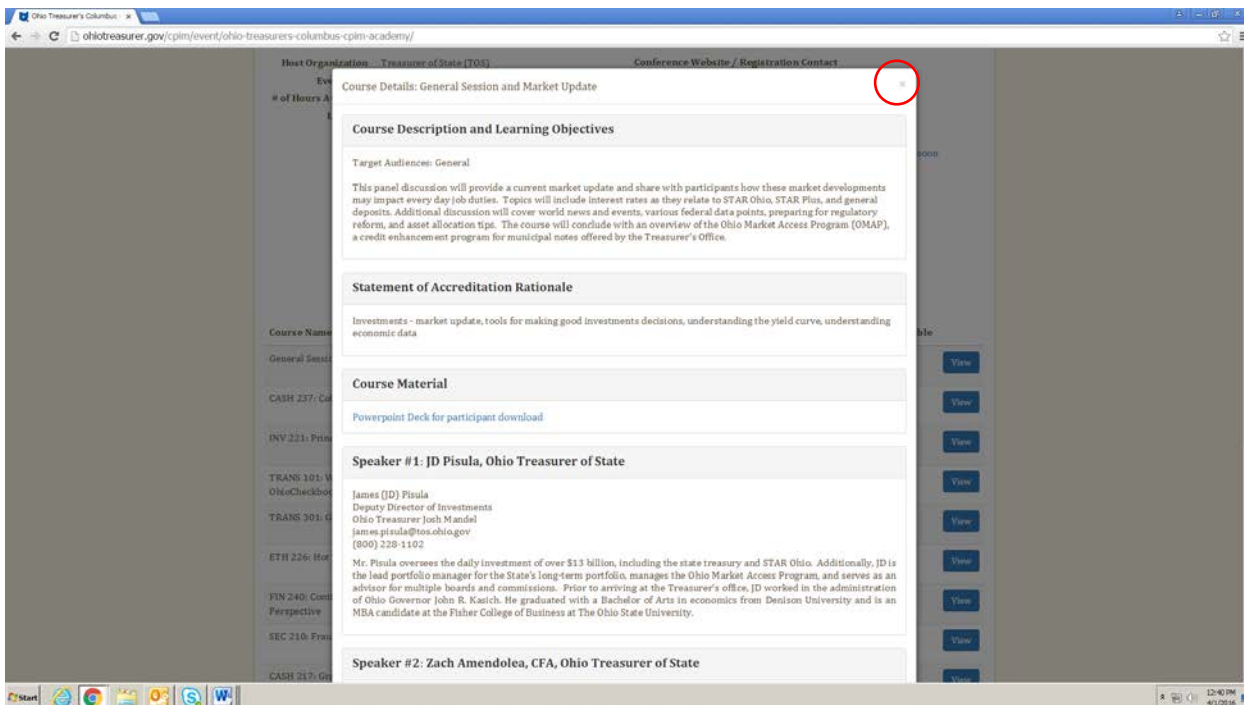
Course Name	Date/Time	Speaker(s)	Hours Available	
General Session and Market Update	4/13/2016 8:30 AM - 9:30 AM	JD Pitsula, Ohio Treasurer of State, Zach Amendolea, CFA, Ohio Treasurer of State	1	View
CASH 237: Collateralized Deposits Update	4/13/2016 9:30 AM - 10:30 AM	Ashley Montgomery, Ohio Treasurer 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 Yacowitz, 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
TRANS 301: Getting the Most Out of OhioCheckbook.com	4/13/2016 9:30 AM - 10:30 AM	OpenGov	1
ETH 226: Hot Topics in Ohio Ethics Law	4/13/2016 10:30 AM - 11:30 AM	Susan Willeke, Ohio Ethics Commission	1
FIN 240: Continuing Disclosure from an Underwriter's Perspective	4/13/2016 10:30 AM - 11:30 AM	Katie Kleinfelder, RBC Capital Markets	1
SEC 210: Fraud Detection and Prevention	4/13/2016 10:30 AM - 11:30 AM	Don Owens, Schneider Downs & Co., Inc.	1
CASH 217: Grants Management and Audit Compliance	4/13/2016 11:30 AM - 12:30 PM	Kelly Berger-Davis, Ohio Auditor of State	1
ETH 226: Hot Topics in Ohio Ethics Law	4/13/2016 11:30 AM - 12:30 PM	Susan Willeke, Ohio Ethics Commission	1
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
FIN 330: Trends in Capital Improvement Refinancing	4/13/2016 1:10 PM - 2:10 PM	Jennifer Blaser, Dinmore & Shohl, LLP, Patrick King, Stifel Nicolaus	1
INV 161: Effective Investment Policies and Investment Statement Analysis	4/13/2016 1:10 PM - 2:10 PM	Ryan Nelson, Redtree Investment Group	1
SEC 161: Electronic Banking and Cyber Security	4/13/2016 1:10 PM - 2:10 PM	Dustin Kohlhorst, Ohio Treasurer of State, Stacey Russell, Muskingum County Library System	1
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
Round Table for Governments with Budgets of \$25m+	4/13/2016 2:10 PM - 3:10 PM	Jonathan Azoil, Ohio Treasurer of State	1
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

[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
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
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

[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.

Search Schedule of Events

Host Organization: Course Date: To:

Keywords: Audience:

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

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.

Search Schedule of Events

Host Organization: Course Date: To:

Audience:

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

- Then, click **Search**.

Search Schedule of Events

Host Organization: **Ohio Association of School Business Officials (OASBO)**

Course Date: To:

Keyword: Audience:

Search

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

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.

Search Schedule of Events

Host Organization: **Ohio Association of School Business Officials (OASBO)**

Course Date: To:

Keyword: Audience:

Search

Event Name	Host	Date	Location	# of Hours Available	
Treasurers Hot Topics Seminar	Ohio Association of School Business Officials (OASBO)	1/19/2016 - 1/20/2016		3	View
OASBO Five County Chapter Meeting	Ohio Association of School Business Officials (OASBO)	1/22/2016		1	View
Miami Valley & Ohio Valley Joint Chapters Meeting	Ohio Association of School Business Officials (OASBO)	1/28/2016	Xenia, OH	3	View
Southern Valley OASBO February Chapter Meeting	Ohio Association of School Business Officials (OASBO)	2/18/2016	The Plains, OH	3	View
Five County OASBO Chapter Meeting	Ohio Association of School Business Officials (OASBO)	2/19/2016	Cuyahoga Falls, OH	1	View
OASBO Southern Hills Chapter Meeting	Ohio Association of School Business	3/9/2016	New Boston, OH	3	View

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**.

Search Schedule of Events

Host Organization: **Ohio Association of School Business Officials (OASBO)** x

Course Date:

To:

Keyword:

Audience:

Event Name	Host	Date	Location	# of Hours Available	
Treasurers Hot Topics Seminar	Ohio Association of School Business Officials (OASBO)	1/19/2016 - 1/20/2016		3	<input type="button" value="View"/>
OASBO Five County Chapter Meeting	Ohio Association of School Business Officials (OASBO)	1/22/2016		1	<input type="button" value="View"/>
Miami Valley & Ohio Valley Joint Chapters Meeting	Ohio Association of School Business Officials (OASBO)	1/28/2016	Xenia, OH	3	<input type="button" value="View"/>
Southern Valley OASBO February Chapter Meeting	Ohio Association of School Business Officials (OASBO)	2/18/2016	The Plains, OH	3	<input type="button" value="View"/>
Five County OASBO Chapter Meeting	Ohio Association of School Business Officials (OASBO)	2/19/2016	Cuyahoga Falls, OH	1	<input type="button" value="View"/>
OASBO Southern Hills Chapter Meeting	Ohio Association of School Business Officials (OASBO)	3/9/2016	New Boston, OH	3	<input type="button" value="View"/>

- 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.

Search Schedule of Events

Host Organization:

Course Date: April - 2016

To:

Keyword:

Audience:

Event Name	Host	Date	Location	# of Hours Available	
Treasurers Hot Topics Seminar	Ohio Association of School Business Officials (OASBO)	1/19/2016 - 1/20/2016		3	<input type="button" value="View"/>
OASBO Five County Chapter Meeting	Ohio Association of School Business Officials (OASBO)	1/22/2016		1	<input type="button" value="View"/>
Miami Valley & Ohio Valley Joint Chapters Meeting	Ohio Association of School Business Officials (OASBO)	1/28/2016	Xenia, OH	3	<input type="button" value="View"/>
Southern Valley OASBO February Chapter Meeting	Ohio Association of School Business Officials (OASBO)	2/18/2016	The Plains, OH	3	<input type="button" value="View"/>
Five County OASBO Chapter Meeting	Ohio Association of School Business Officials (OASBO)	2/19/2016	Cuyahoga Falls, OH	1	<input type="button" value="View"/>
OASBO Southern Hills Chapter Meeting	Ohio Association of School Business Officials (OASBO)	3/9/2016	New Boston, OH	3	<input type="button" value="View"/>
PPR 5-Year Financial Forecasting Seminar	Ohio Association of School Business Officials (OASBO)	3/10/2016	Hanoverton, OH	3	<input type="button" value="View"/>

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

Search Schedule of Events

Host Organization:

Course Date: 04/01/2016

To:

Keyword:

Event Name	Host	Date	Location	# of Hours Available	
Treasurers Hot Topics Seminar	Ohio Association of School Business Officials (OASBO)	1/19/2016 - 1/20/2016		3	View
OASBO Five County Chapter Meeting	Ohio Association of School Business Officials (OASBO)	1/22/2016		1	View
Miami Valley & Ohio Valley Joint Chapters Meeting	Ohio Association of School Business Officials (OASBO)	1/28/2016	Xenia, OH	3	View
Southern Valley OASBO February Chapter Meeting	Ohio Association of School Business Officials (OASBO)	2/18/2016	The Plains, OH	3	View
Five County OASBO Chapter Meeting	Ohio Association of School Business Officials (OASBO)	2/19/2016	Cuyahoga Falls, OH	1	View
OASBO Southern Hills Chapter Meeting	Ohio Association of School Business Officials (OASBO)	3/9/2016	New Boston, OH	3	View
PPF 5-Year Financial Forecasting Seminar	Ohio Association of School Business	3/10/2016	Hanoverton, OH	3	View

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

Search Schedule of Events

Host Organization:

Course Date: 04/01/2016

To: 04/29/2016

Keyword:

Audience:

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

- 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**.

Search Schedule of Events

Host Organization: Course Date: To:

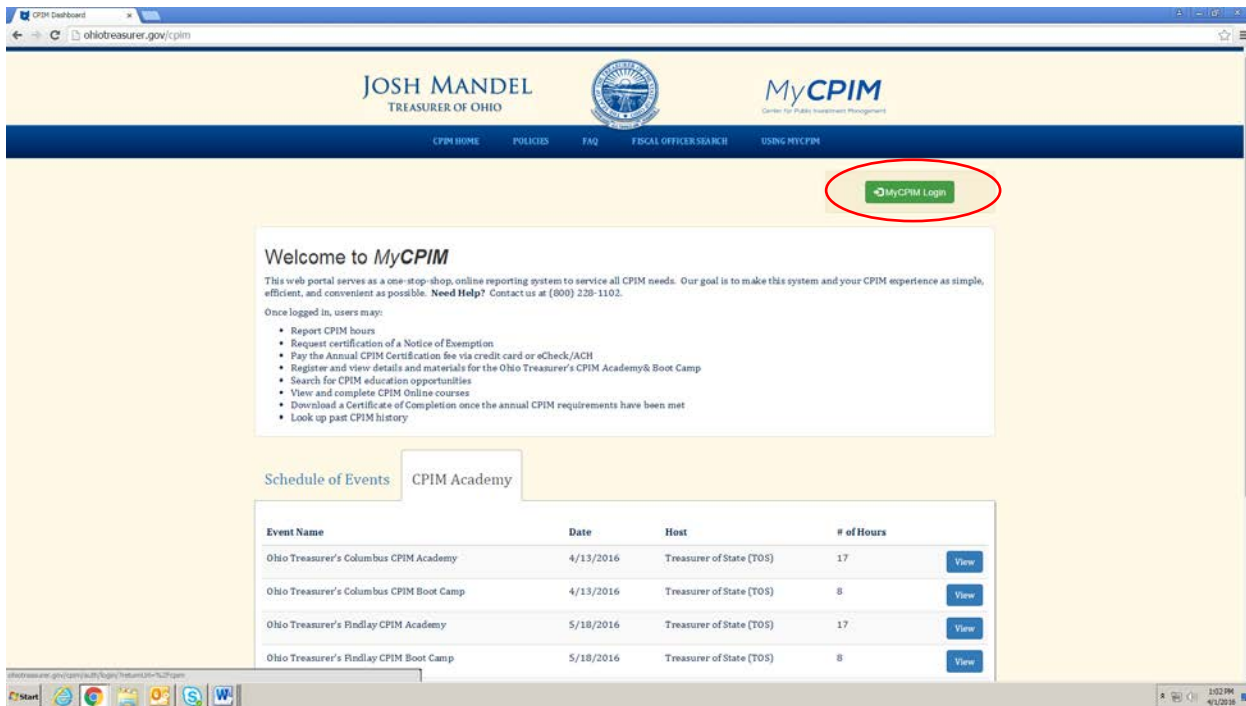
Keyword: Audience:

Event Name	Host	Date	Location	# of Hours Available	
Public Library Fiscal Officer Conference	Ohio Library Council (OLC)	3/31/2016 - 4/1/2016	Lewis Center, OH	8	View
OASBO 2016 Annual Workshop	Ohio Association of School Business Officials (OASBO)	4/12/2016 - 4/15/2016	Columbus, OH	14	View
Ohio Treasurer's Columbus CPIM Academy	Treasurer of State (TOS)	4/13/2016	Columbus, OH	17	View
Ohio Treasurer's Columbus CPIM Boot Camp	Treasurer of State (TOS)	4/13/2016	Columbus, OH	8	View
Ohio Treasurer's Findlay CPIM Academy	Treasurer of State (TOS)	5/10/2016	Findlay, OH	17	View
Ohio Treasurer's Findlay CPIM Boot Camp	Treasurer of State (TOS)	5/10/2016	Findlay, OH	8	View
Ohio Treasurer's Cincinnati CPIM	Treasurer of State (TOS)	9/14/2016	Sharonville, OH	17	View

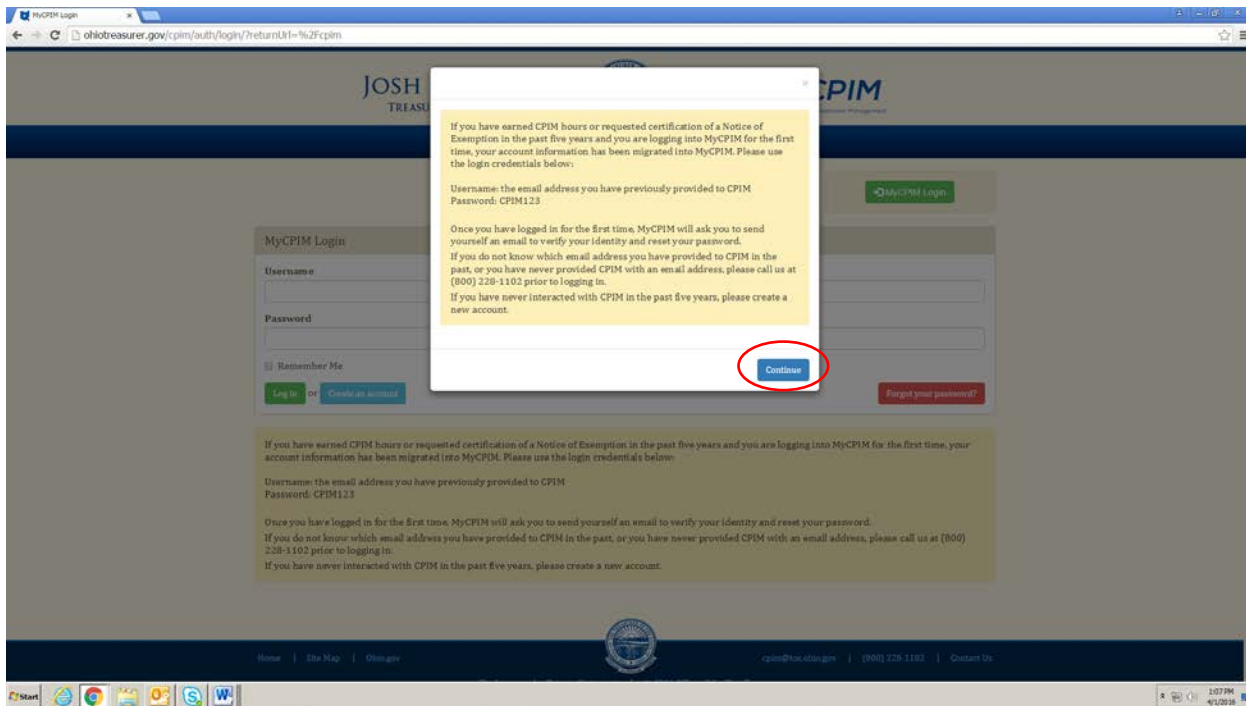
You will see all of the courses that Ryan has presented or is presenting in the future just by searching his name. You can also search for any topic, like finance, invest or even as specific as headwind.

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.

MyCPIM Login

ohiotreasurer.gov/cpim/auth/login?returnUrl=%2Fcpim

JOSH MANDEL
TREASURER OF OHIO

MyCPIM
Center for Public Investment Management

CPIM HOME POLICIES FAQ FISCAL OFFICER SEARCH USING MYCPIM

MyCPIM Login

Username

Password

☐ Remember Me

Log in or Forgot your password?

If you have earned CPIM hours or requested certification of a Notice of Exemption in the past five years and you are logging into MyCPIM for the first time, your account information has been migrated into MyCPIM. Please use the login credentials below:

Username: the email address you have previously provided to CPIM
Password: CPIM123

Once you have logged in for the first time, MyCPIM will ask you to send yourself an email to verify your identity and reset your password.

If you do not know which email address you have provided to CPIM in the past, or you have never provided CPIM with an email address, please call us at (800) 228-1102 prior to logging in.

If you have never interacted with CPIM in the past five years, please create a new account.

Home | Site Map | Ohio.gov

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

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.

MyCPIM Login

Username
fiscal@mail@ontarioship.org

Password

☐ Remember Me

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

If you have earned CPIM hours or requested certification of a Notice of Exemption in the past five years and you are logging into MyCPIM for the first time, your account information has been migrated into MyCPIM. Please use the login credentials below:
Username: the email address you have previously provided to CPIM
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Once you have logged in for the first time, MyCPIM will ask you to send yourself an email to verify your identity and reset your password.
If you do not know which email address you have provided to CPIM in the past, or you have never provided CPIM with an email address, please call us at (800) 228-1102 prior to logging in.
If you have never interacted with CPIM in the past five years, please create a new account.

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**.

Recover your account

Your past CPIM history has been migrated from our old tracking system into MyCPIM dating back five years. In order to log into your account, please verify your identity and reset your password by clicking on the button below. You will receive an email with a link to reset your password.

[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.

- From:** TOS CPIM [<mailto:cpim@tos.ohio.gov>]
Sent: Wednesday, January 27, 2016 3:55 PM
To: Margolies, Mark
Subject: RE: MyCPIM Password Reset
- Dear Mark:**
- Please follow this [link](#) to reset your password.
- If you did not initiate this password reset, please contact us immediately.
- Sincerely,**
The CPIM Team
- Center for Public Investment Management (CPIM)
Ohio Treasurer Josh Mandel
30 East Broad Street, 10th Floor
Columbus, OH 43215
[\(800\) 228-1102](tel:8002281102)
cpim@tos.ohio.gov

-
- The screenshot displays the 'Reset your password' page on the Ohio Treasurer's Office website. The page is viewed through an Internet Explorer browser window. The header includes the Ohio Treasurer's Office logo, the name 'JOSH MANDEL TREASURER OF OHIO', and the 'MyCPIM' logo. A navigation bar contains links for 'CPIM HOME', 'POLICIES', 'FAQ', 'FISCAL OFFICER SEARCH', and 'USING MYCPIM'. On the right side of the page, there is a green 'MyCPIM Login' button. The main content area is titled 'Reset your password' and contains a form with three input fields: 'Username', 'Password', and 'Confirm password'. Below these fields is a 'Reset' button, which is circled in red. The footer of the page includes a 'Home | Site Map | Ohio.gov' link, the Ohio Treasurer's Office logo, contact information 'cpim@treasury.ohio.gov | (800) 228-1102 | Contact Us', and a date stamp '2017/04/20/2018'.

- 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**.

The screenshot shows a web browser window with the URL `ohio.treasurer.gov/cpm/aut/register/`. The page is titled "Create an account" and contains several form sections: "Subdivisions" (with a note that they can be added after registration), "Business Address", and "Mailing Address". Each address section includes fields for "Address", "Address (Line 2)", "City", "State" (a dropdown menu currently showing "Ohio"), and "Zip". At the bottom of the form, there are two buttons: a red "Cancel" button and a blue "Register" button, which is circled in red. The footer of the page includes links for "Home", "Site Map", "Ohio.gov", "cpim@treas.ohio.gov", "(800) 228-1102", and "Contact Us".

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

The screenshot shows a web browser window with the URL `ohio.treasurer.gov/cpm/aut/accountcreated/`. The page features the header for "JOSH MANDEL, TREASURER OF OHIO" and "MyCPIM, Center for Public Investment Management". A navigation bar includes links for "CPIM HOME", "POLICIES", "FAQ", "FISCAL OFFICER SEARCH", "USING MYCPIM", "SCHEDULE OF EVENTS", "ONLINE CONCERNS", "EXEMPTION CERTIFICATION", and "PAY YOUR FEE". A red warning banner states: "Warning: Your 2016 Annual CPIM Certification fee has NOT been paid. Click here to pay." To the right, there are buttons for "My Profile" and "Logout", and a box showing "Total 2016 CPIM Hours Earned: 0". The main content area says "Account created" and "Thank you for registering for MyCPIM! If you have any questions or need help navigating MyCPIM, give us a call at (800) 228-1102." Below this, a green button labeled "Continue to your profile" with a right-pointing arrow is circled in red.

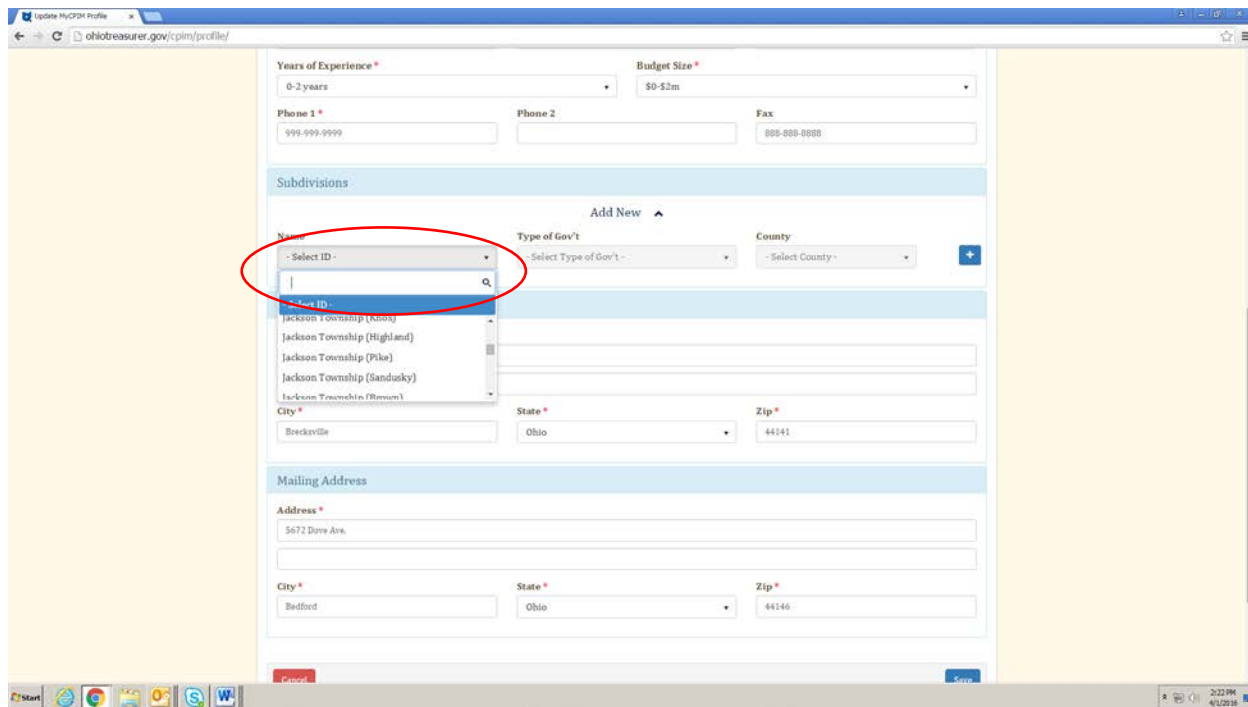
- Once you log in successfully for the first time, you will need to update, complete or confirm your profile.

The screenshot shows the 'Update MyCPIM Profile' page. At the top, there is a header for 'JOSH MANDEL TREASURER OF OHIO' and 'MyCPIM Center for Public Investment Management'. Below the header is a navigation bar with links: 'CPIM HOME', 'POLICIES', 'FAQ', 'FISCAL OFFICER SEARCH', 'USING MYCPIM', 'SCHEDULE OF EVENTS', 'ONLINE COURSES', 'EXEMPTION CERTIFICATION', and 'PAY YOUR FEE'. A red warning banner states: 'Warning: Your 2016 Annual CPIM Certification fee has NOT been paid. Click here to pay.' To the right of the banner are buttons for 'My Profile' and 'Logout', and a box showing 'Total 2016 CPIM Hours Earned: 0'. The main form area is titled 'Update MyCPIM Profile' and contains two sections: 'Account Information' and 'General Information'. The 'Account Information' section has fields for 'Username' (filled with 'tos-user'), 'Email' (filled with 'cpim@tos.ohio.gov'), 'Password (enter to change)', and 'Confirm password (confirm to change)'. The 'General Information' section has a yellow note: 'Users may not update their name online. If you need to update your name, please call us at (800) 228-1102.' Below this are fields for 'First Name' (filled with 'TOS'), 'Last Name' (filled with 'Testing'), 'Title' (filled with 'President'), 'Years of Experience' (dropdown menu showing '0-2 years'), 'Budget Size' (dropdown menu showing '\$0-\$2m'), 'Phone 1' (filled with '999-999-9999'), 'Phone 2', and 'Fax' (filled with '888-888-8888').

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

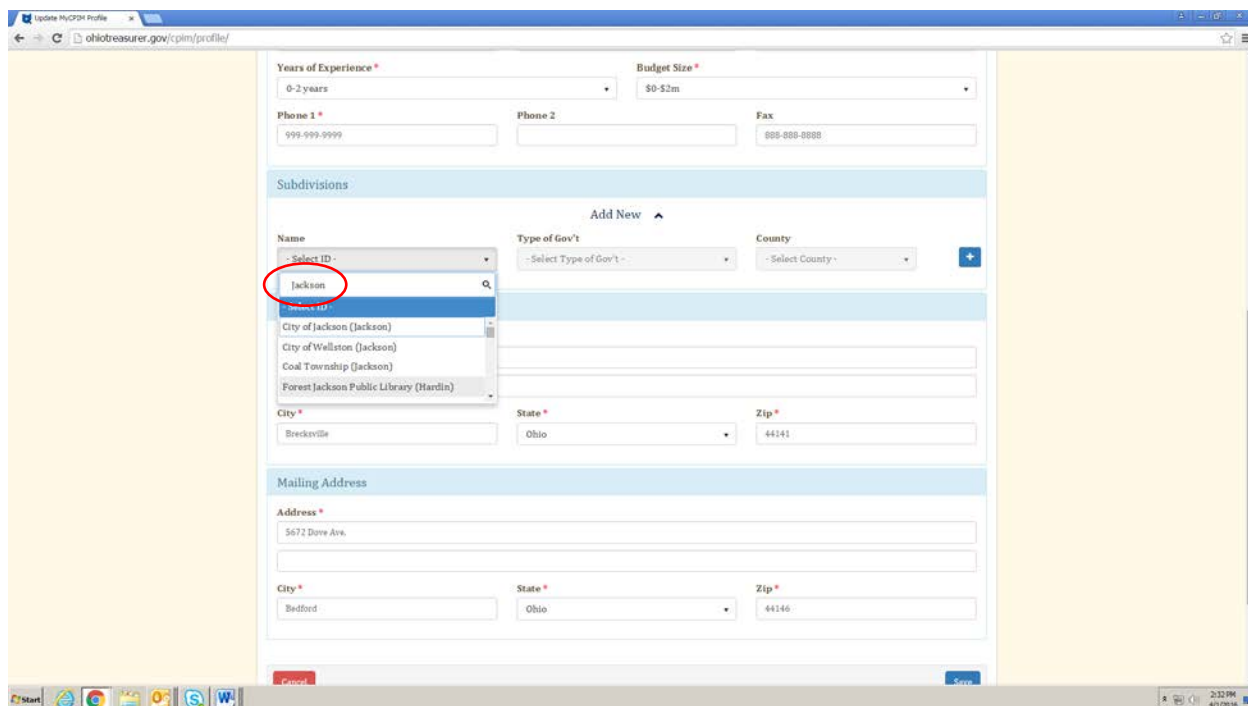
The screenshot shows the 'Subdivisions' section of the 'Update MyCPIM Profile' page. It features a dropdown menu labeled 'Add New' with a red circle around the down arrow. Below this are sections for 'Business Address' and 'Mailing Address'. The 'Business Address' section has fields for 'Address' (filled with '6909 Royalton Rd.'), 'City' (filled with 'Brecksville'), 'State' (dropdown menu showing 'Ohio'), and 'Zip' (filled with '44141'). The 'Mailing Address' section has fields for 'Address' (filled with '5872 Dove Ave.'), 'City' (filled with 'Bedford'), 'State' (dropdown menu showing 'Ohio'), and 'Zip' (filled with '44146'). At the bottom of the form are 'Cancel' and 'Save' buttons.

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



The screenshot shows the 'Update MyCPIM Profile' page on the website ohiotreasurer.gov/cpim/profile/. The 'Subdivisions' section is active, and the 'Name' dropdown menu is open. The search bar within the dropdown contains the text 'Jackson'. The dropdown list shows several subdivisions, including 'Jackson Township (Knox)', 'Jackson Township (Highland)', 'Jackson Township (Pike)', 'Jackson Township (Sandusky)', and 'Jackson Township (Ransom)'. The 'City' field is set to 'Brecksville', the 'State' is 'Ohio', and the 'Zip' is '44141'.

- 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.



The screenshot shows the 'Update MyCPIM Profile' page on the website ohiotreasurer.gov/cpim/profile/. The 'Subdivisions' section is active, and the 'Name' dropdown menu is open. The search bar within the dropdown contains the text 'Jackson'. The dropdown list shows several subdivisions, including 'Jackson Township (Knox)', 'Jackson Township (Highland)', 'Jackson Township (Pike)', 'Jackson Township (Sandusky)', and 'Jackson Township (Ransom)'. The 'City' field is set to 'Brecksville', the 'State' is 'Ohio', and the 'Zip' is '44141'.

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 the 'Update MyCPM Profile' page on the website 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 has an 'Add New' button with a plus sign. The 'Subdivisions' section also includes dropdown menus for 'Name' (Select ID), 'Type of Gov't' (Select Type of Gov't), and 'County' (Select County). The 'Business Address' section includes fields for 'Address' (6909 Royalton Rd.), 'City' (Brecksville), 'State' (Ohio), and 'Zip' (44141). The 'Mailing Address' section includes fields for 'Address' (5672 Dove Ave.), 'City' (Bedford), 'State' (Ohio), and 'Zip' (44146). A red circle highlights the '+' button in the 'Subdivisions' section.

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

The screenshot shows the same 'Update MyCPM Profile' page. In the 'Subdivisions' section, the 'Name' dropdown menu is now populated with 'City of Jackson (Jackson)'. The 'Type of Gov't' dropdown menu is now populated with 'Municipality'. The 'County' dropdown menu is now populated with 'Jackson'. A red oval highlights the '+' button in the 'Subdivisions' section, indicating that a second set of subdivision identifiers will be brought up.

- 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*.

Update MyCPD Profile

ohiotreasurer.gov/cpm/profile/

Years of Experience * 0-2 years Budget Size * \$0-\$3m

Phone 1 * 999-999-9999 Phone 2 Fax 888-888-8888

Subdivisions

Add New

Name	Type of Gov't	County
Ada Exempted Village School District (Ha...	School District	Hardin
- Select ID -	- Select Type of Gov't -	- Select County -

Business Address

Address * 6909 Royalton Rd.

City * Brecksville State * Ohio Zip * 44141

Mailing Address

Address * 5672 Dove Ave.

City * Bedford State * Ohio Zip * 44146

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

Update MyCPD Profile

ohiotreasurer.gov/cpm/profile/

Add New

Name	Type of Gov't	County
- Select ID -	- Select Type of Gov't -	- Select County -

Business Address

Address * 6909 Royalton Rd.

City * Brecksville State * Ohio Zip * 44141

Mailing Address

Address * 5672 Dove Ave.

City * Bedford State * Ohio Zip * 44146

Cancel Save

Home Site Map Ohio.gov

cpm@treas.ohio.gov | (800) 228-1102 | Contact Us

Disclaimer Privacy Statement © 2016 Office of the Ohio Treasurer

- 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.

The screenshot shows the 'Update MyCPIM Profile' form on the OhioCPIM website. The form is titled 'Add New' and includes sections for 'Business Address' and 'Mailing Address'. Each section has fields for 'Address', 'City', 'State', and 'Zip'. The 'Save' button is circled in red at the bottom right of the form.

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

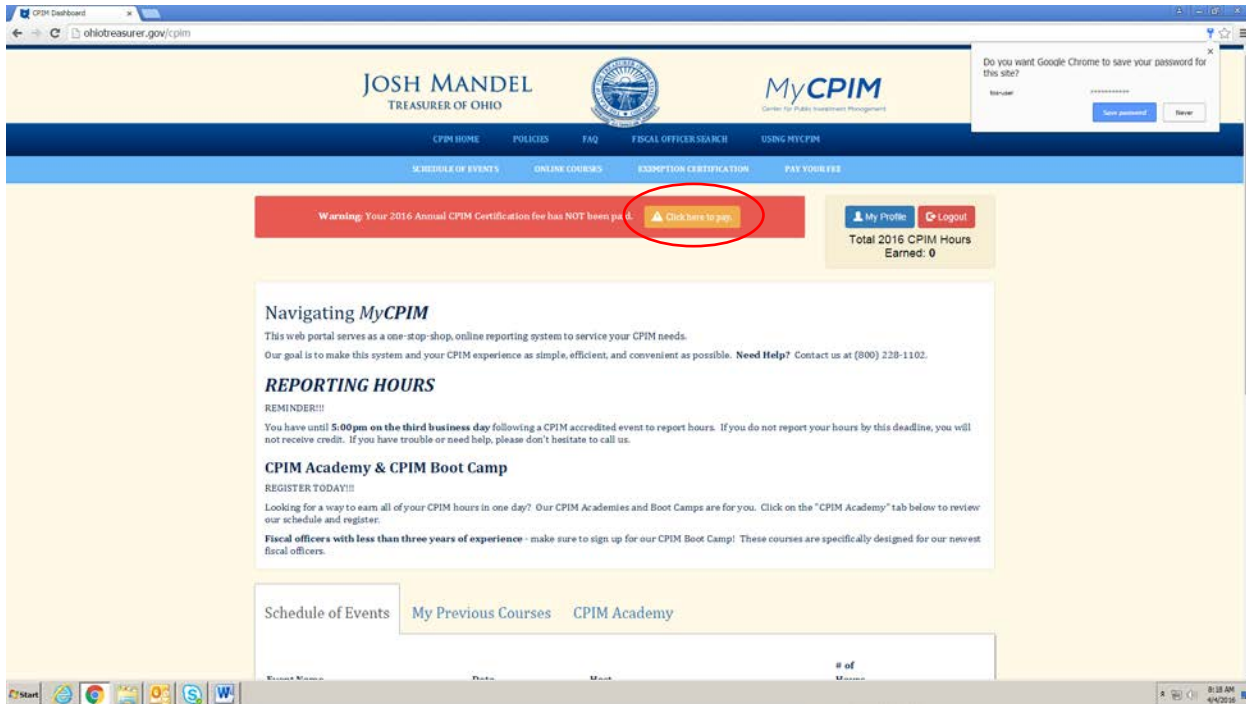
- At any time, once logged in, you may access your MyCPIM Profile from the **Hours Earned** box. The same steps taken to update your profile upon initial log in apply. You may also update your password from your profile.

The screenshot shows the 'MyCPIM Dashboard' on the OhioCPIM website. The dashboard includes a warning about the 2016 Annual CPIM Certification fee, a 'My Profile' button circled in red, and a 'Total 2016 CPIM Hours Earned: 0' box. Below the dashboard, there is a section for 'Navigating MyCPIM' and 'REPORTING HOURS'.

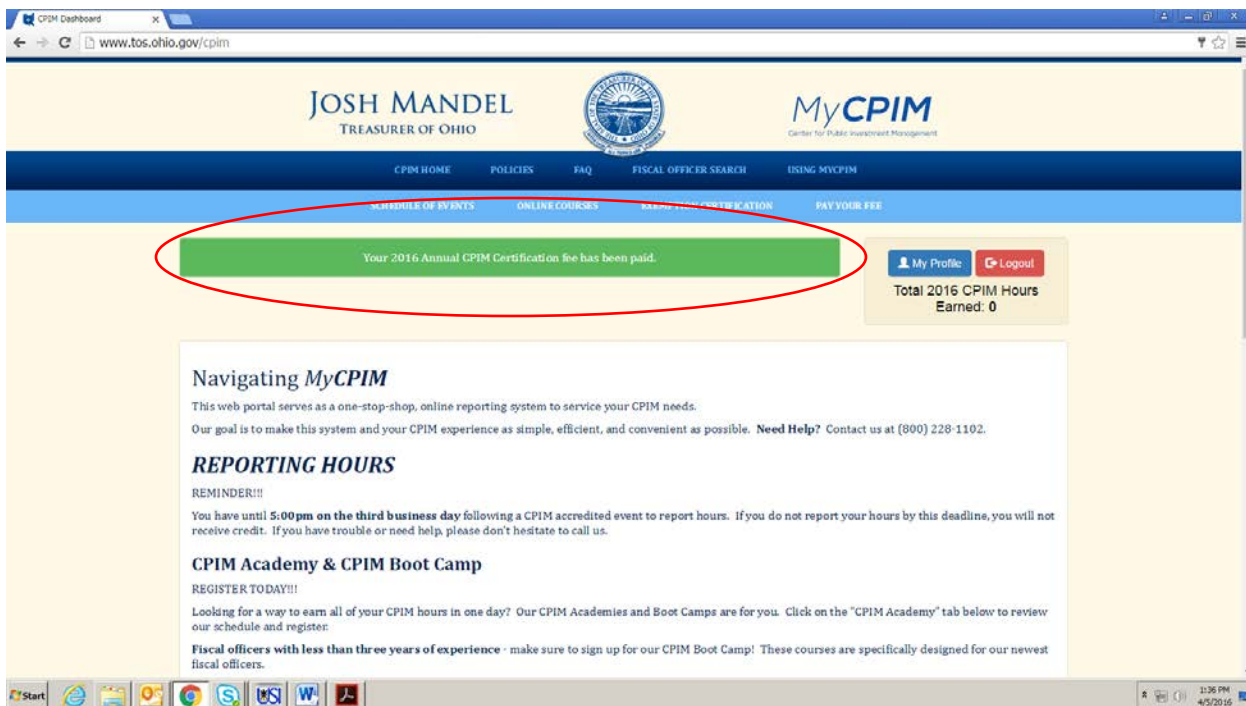
NOTE: Be sure to keep your profile up to date. For security and data integrity purposes, users may not update their name. Please call us at (800) 228-1102 for any name changes.

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, POLICIES, 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 states: "Warning: Your 2016 Annual CPIM Certification fee has NOT been paid. Click here to pay." In the top right corner, a box displays "Total 2016 CPIM Hours Earned: 0", which is circled in red. The main content area includes a section titled "Navigating MyCPIM" with a brief description of the portal's purpose and contact information. Below this is a "REPORTING HOURS" section with a "REMINDER!!!" about the 5:00pm deadline for reporting hours. Further down is a "CPIM Academy & CPIM Boot Camp" section with a "REGISTER TODAY!!!" call to action. At the bottom, there are tabs for "Schedule of Events", "My Previous Courses", and "CPIM Academy". The Windows taskbar at the bottom shows the Start button and several application icons, with the system clock indicating 8:21 AM on 4/9/2016.

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

Search

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	View
OASBO 2016 Annual Workshop	Ohio Association of School Business Officials (OASBO)	4/12/2016 - 4/15/2016	Columbus, OH	14	View
Ohio Treasurer's Columbus CPIM Academy	Treasurer of State (TOS)	4/13/2016	Columbus, OH	17	Register View
Ohio Treasurer's Columbus CPIM Boot Camp	Treasurer of State (TOS)	4/13/2016	Columbus, OH	8	Register View
Ohio Treasurer's Findlay CPIM Academy	Treasurer of State (TOS)	5/18/2016	Findlay, OH	17	Register View

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-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:

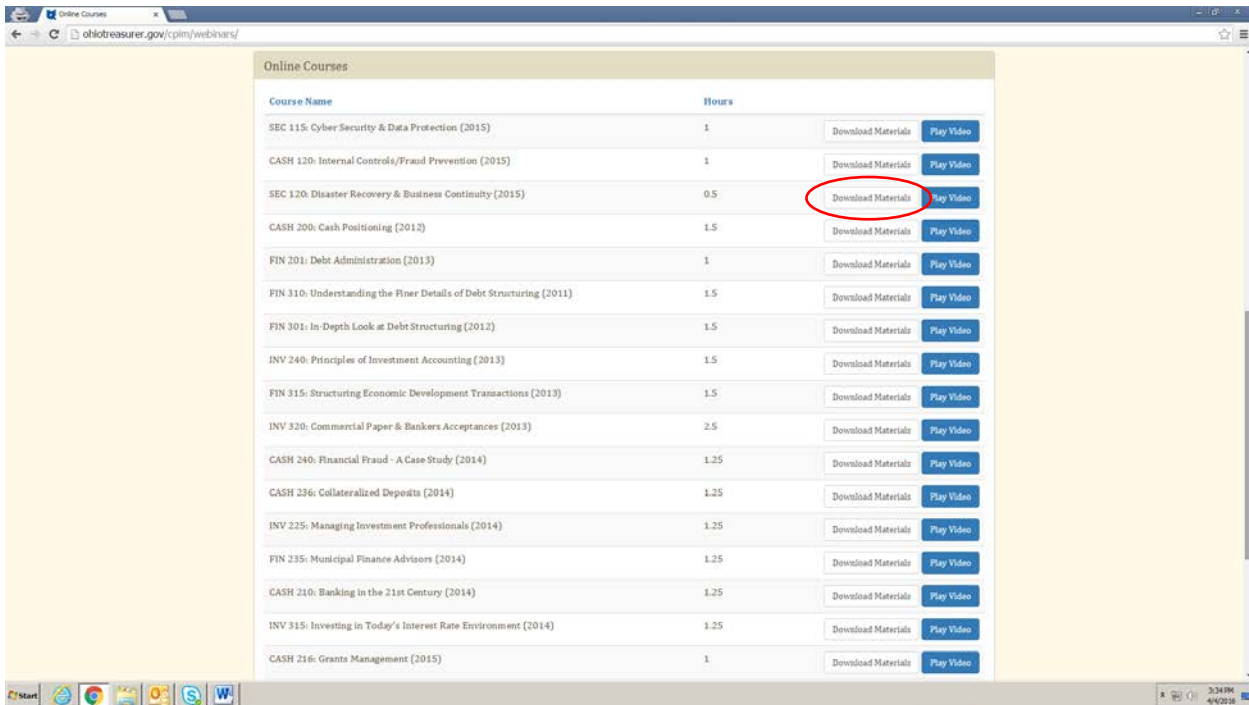
- Do not maximize the viewing window. You will not be able to successfully see all of the quiz questions.
- Mobile viewing is not supported at this time. Please do not try to access these videos from your phone or tablet.

Policies:

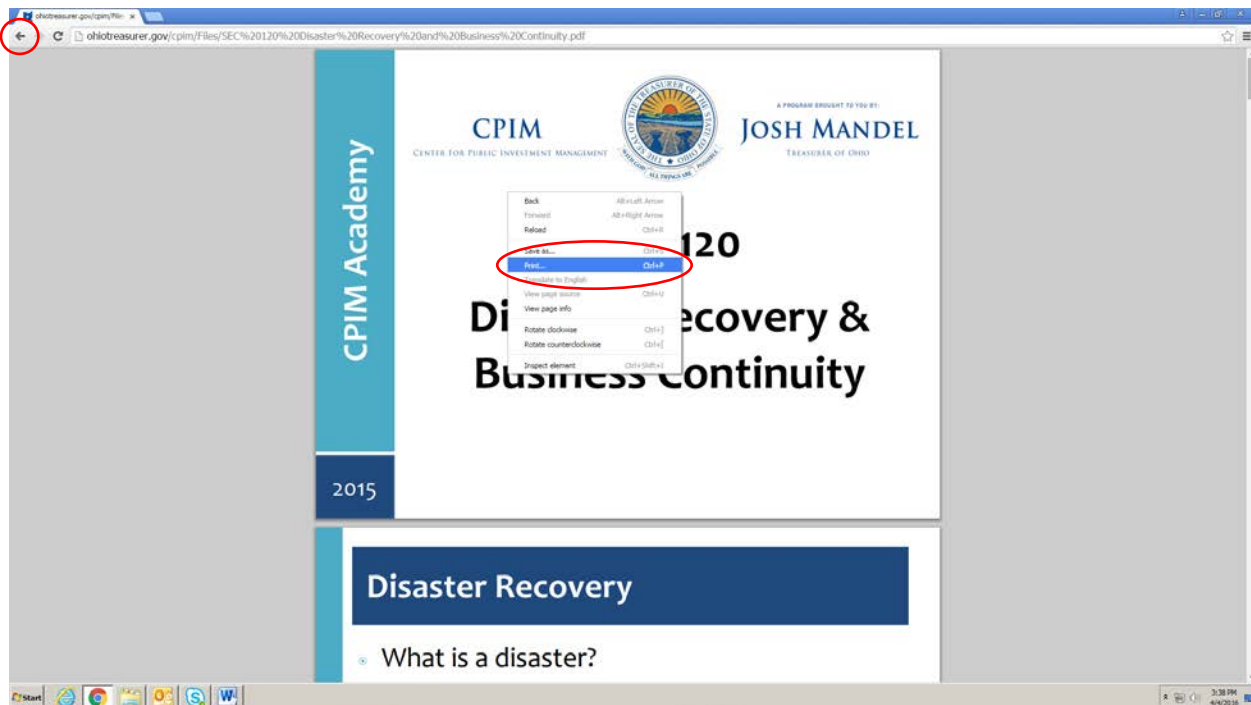
- You may not receive credit for an online course that you have previously viewed in the past five years.
- You may not receive credit for an online course if you have attended the same course at a CPIM Academy within the same calendar year. For example, if you attend CASH 200 at CPIM Academy in April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

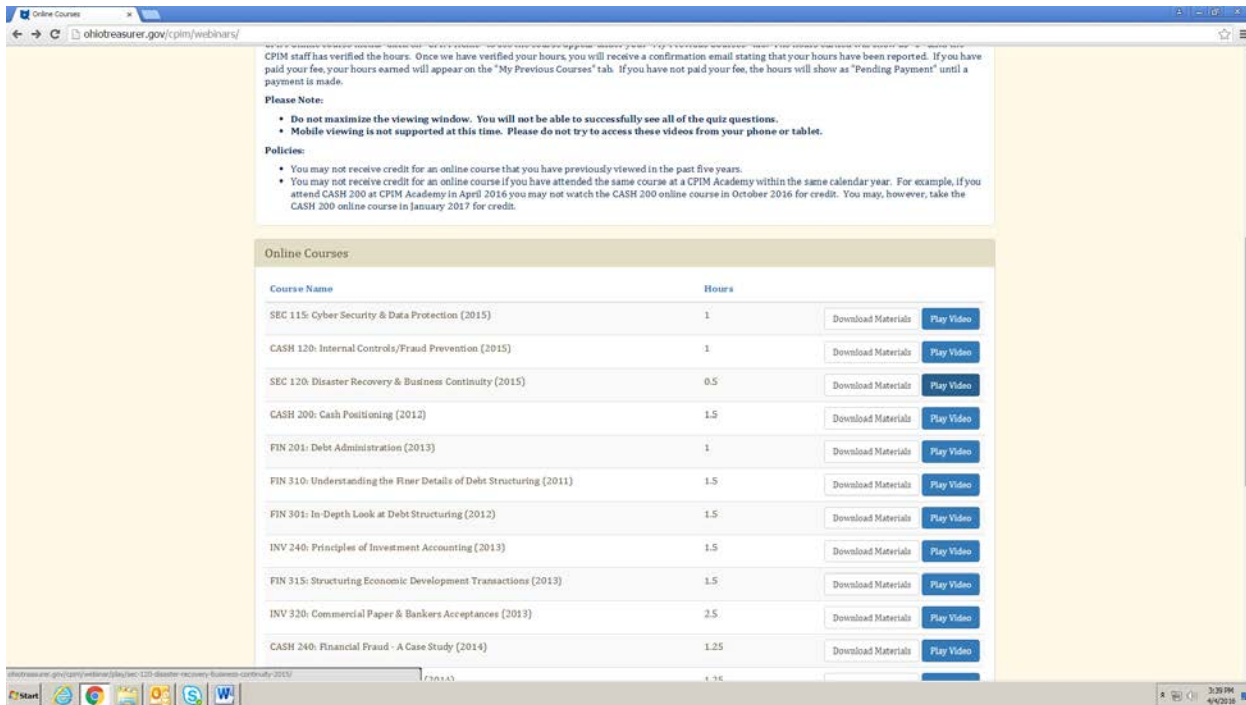


- This will go to a PDF page. To print, right click on the document, and select **Print**. To go back to CPIM Online, click the browser back arrow.



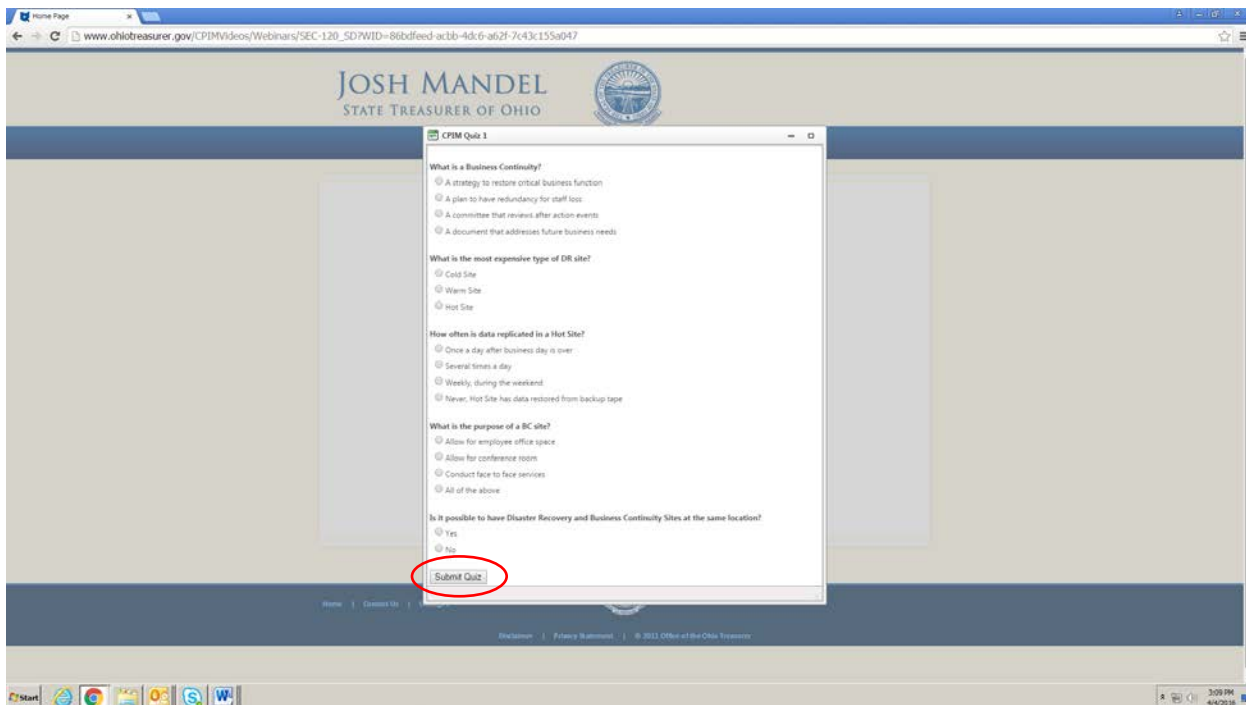
NOTE: Some of the slides are not well viewed in the videos, so it's worth it to print the materials to follow along.

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



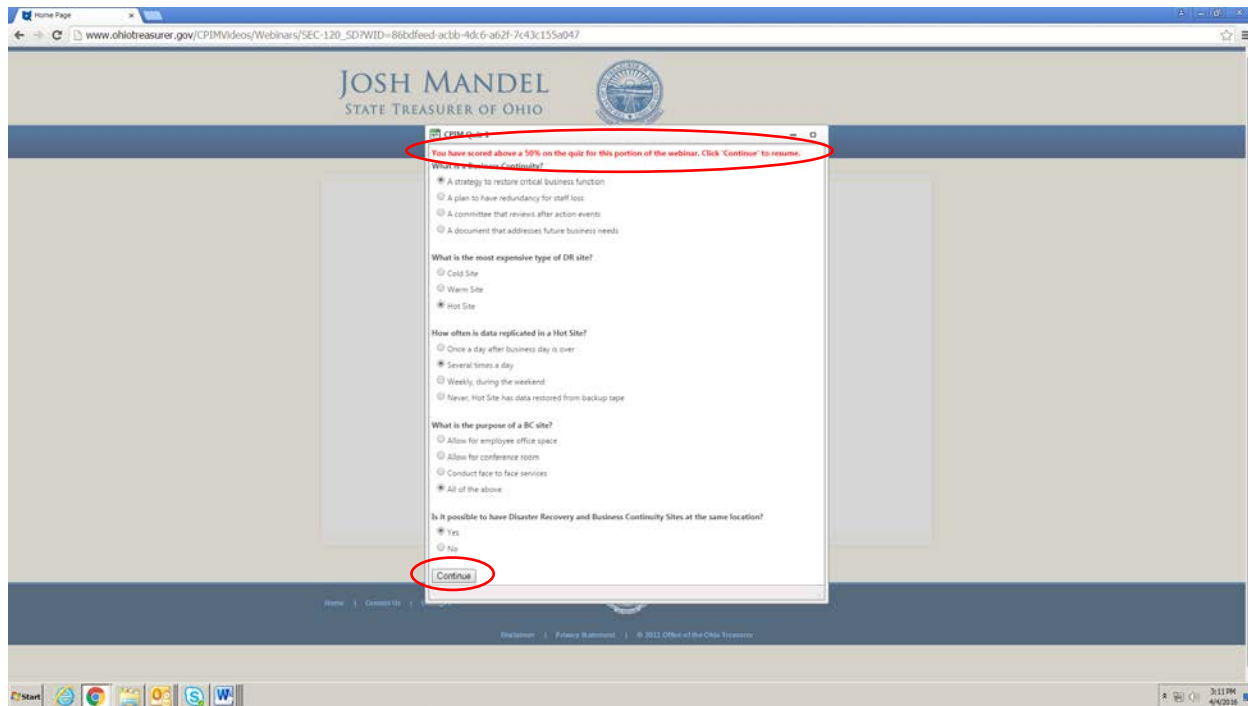
NOTE: Do not maximize the viewing window. You will not be able to successfully see all of the quiz questions. Mobile viewing is not supported at this time. Do not try to watch these videos from a phone or tablet. You may not fast forward through the video, but you may rewind.

- 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**.

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 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

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-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.

- 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.

Schedule of Events **My Previous Courses** CPIM Academy

2016 [Go](#)

Total 2016 CPIM Hours Earned: 0 out of 6 required

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	View
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	View
Online Course		2/29/2016		0	View
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	View
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	View
Online Course	SEC 115: Cyber Security & Data Protection (2015)	4/4/2016		0	View
Online Course	SEC 120: Disaster Recovery & Business Continuity (2015)	4/4/2016		0	View

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

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- 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, of the of the of Ohio, hereby certify that:

- I am a "Treasurer" as defined in the Ohio Revised Code § 135.22(A)(3), 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

☐ 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](#) [POLICIES](#) [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**.

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

Total 2016 CPIM Hours Earned: Exempt

Event Name	Course Name	Date	Host	Hours Earned
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 <input type="button" value="View"/>

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- 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.

Dear Mark:

Pursuant to Ohio Revised Code §135.22, treasurers may provide an annual notice of exemption from the continuing education requirements to the auditor of state that shall be certified by the treasurer of state.

This is your Certified Annual Notice of Exemption for 2016.

Please file this email in your records.

If you ever need to resend this email to yourself (in case you lose or delete this email), you may do so by completing the following steps:

- Log into [MyCPIM](#)
- Click on the "My Previous Courses" tab
- Click on "Resend Exemption Email" box in the top right corner of the tab. (This box will not appear until your Annual Notice of Exemption has been certified.)
- To review previous years' Certified Annual Notices of Exemption, change the year in the dropdown in the top left corner of the tab

If you have any questions or need help navigating [MyCPIM](#), give us a call at (800) 228-1102.

Sincerely,
 The CPIM Team

Center for Public Investment Management (CPIM)
 Ohio Treasurer Josh Mandel
 30 East Broad Street, 10th Floor
 Columbus, OH 43215
 (800) 228-1102
cpim@tos.ohio.gov

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

I, Mark Margolies, CPIM Officer of the N/A County of Ohio, hereby certify that:

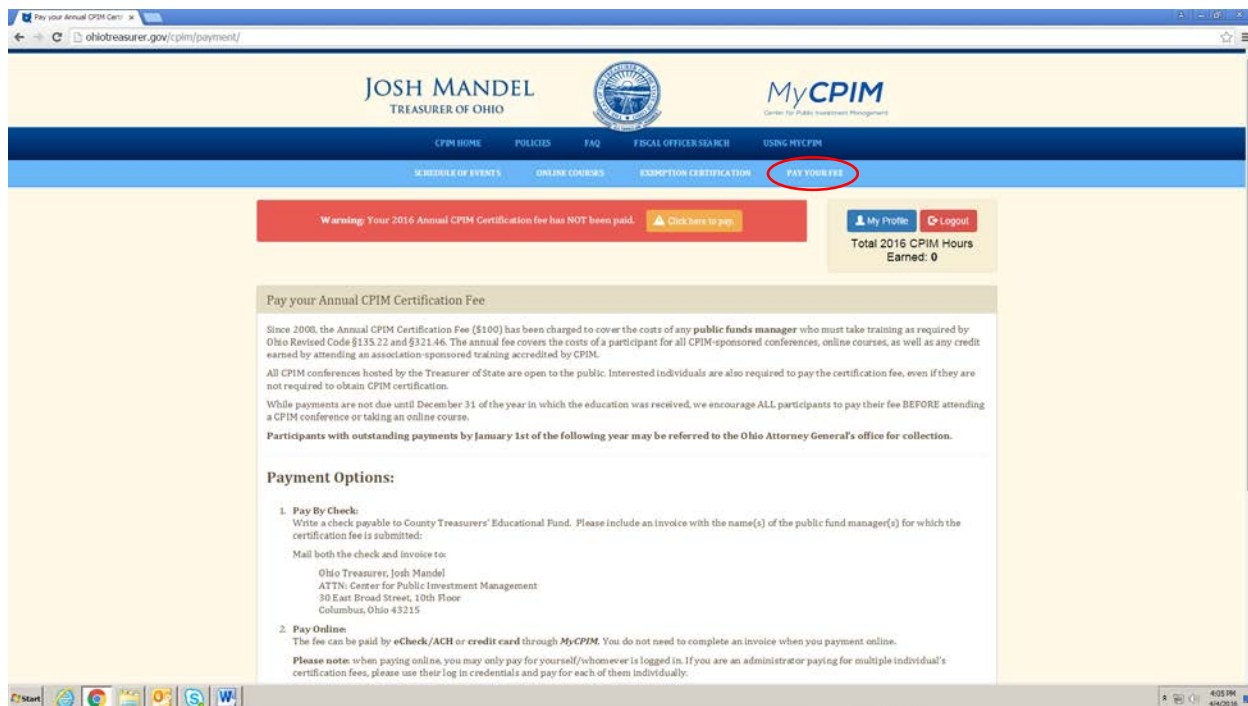
(1) I am a "Treasurer" as defined in the Ohio Revised Code §135.22(A)(1), and

(2) 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 moneys only in:

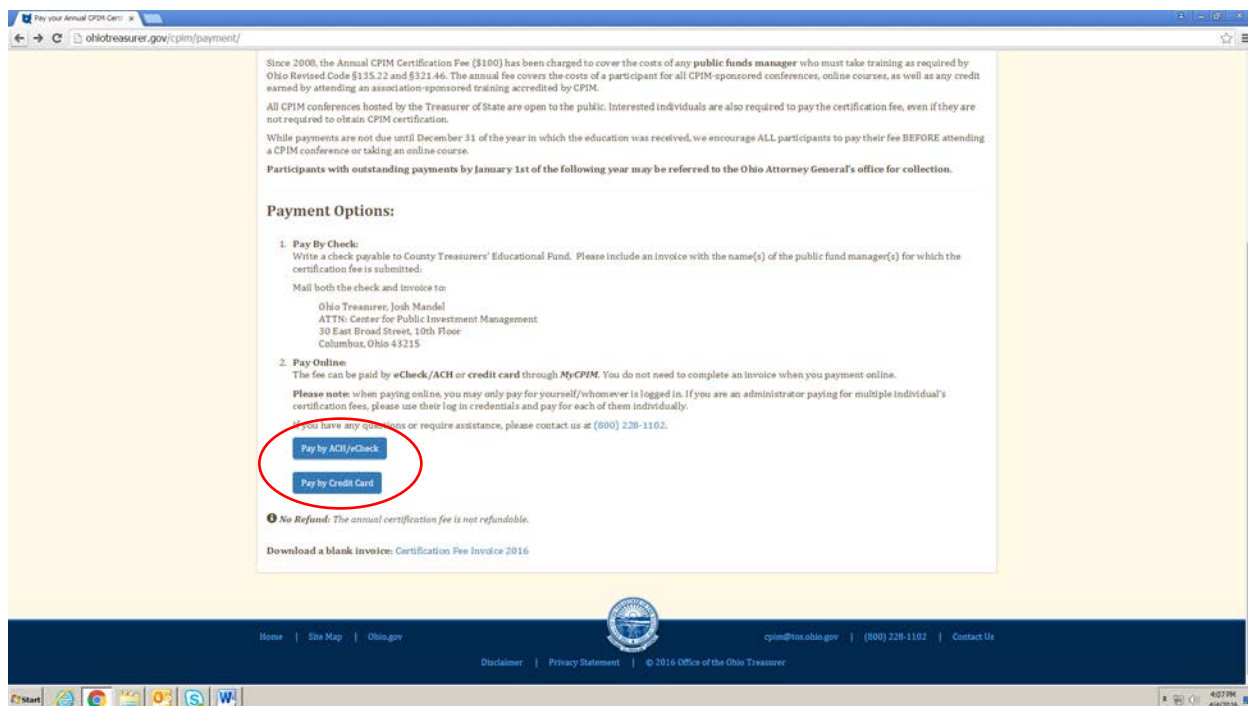
- ☒ a bank account holding only active deposits;
- ☐ interim deposits pursuant to the Ohio Revised Code §135.14(B)(3);
- ☐ the STAR Plus program pursuant to the Ohio Revised Code §135.145;
- ☒ no-load money market mutual funds pursuant to the Ohio Revised Code §135.14(B)(5); and/or
- ☐ the Ohio subdivision's fund (STAR Ohio) pursuant to the Ohio Revised Code §135.14(B)(6).

(3) 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.

- 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.



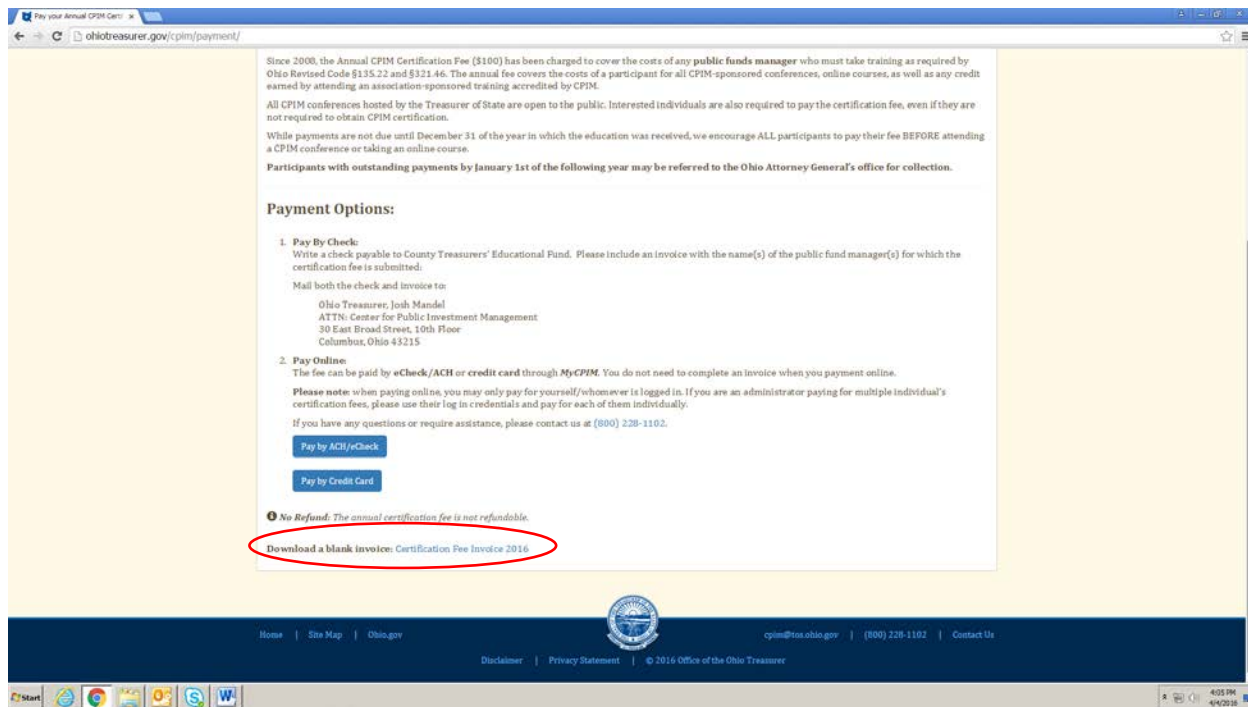
- This will open our payment portal. Fill out the required information, and click **Continue**.

The screenshot shows the CBOSS Pay Bill Online interface. At the top, there's a header with the CBOSS logo and the text "Pay Bill Online". Below this, the page title "CBOSS" is displayed. The main heading is "Step 1 - Enter Payment Information". A sub-heading reads: "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." Below this, there are three sections: "CBOSS Payment Summary", "Payment Information", and "Billing Information". The "CBOSS Payment Summary" section shows a total of \$100.00. The "Payment Information" section includes fields for Credit Card Number, Expiration Month, Expiration Year, and Card Security Code. The "Billing Information" section includes fields for First Name, Last Business Name, Address Line 1, City, Zip/Postal Code, Middle Name, Phone, Address Line 2, State/Province/Region, and Country. The "Continue" button is circled in red. A "Cancel" button is also visible. At the bottom, there is a "Technical Support" link and a copyright notice for CBOSS, Inc.

- 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.

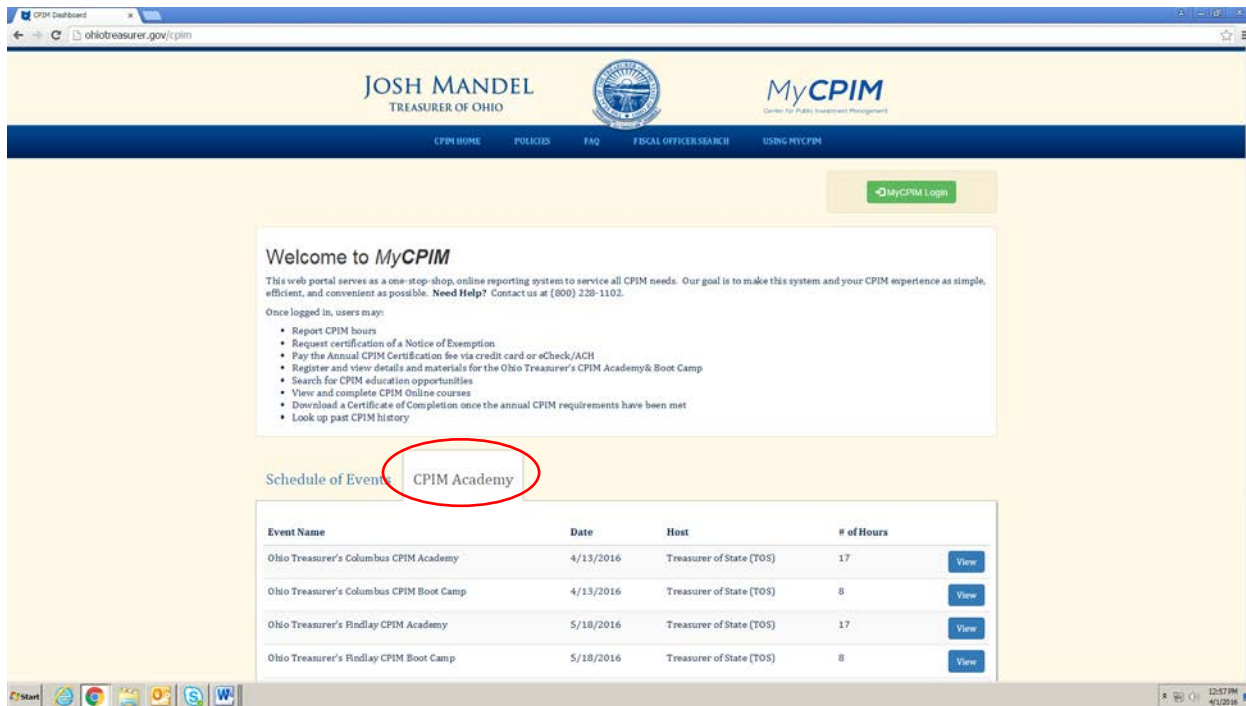
The screenshot shows the CBOSS Pay Bill Online interface. At the top, there's a header with the CBOSS logo and the text "Pay Bill Online". Below this, the page title "CBOSS" is displayed. The main heading is "Step 2 - Confirm Payment Information". A sub-heading reads: "Please confirm that your credit card payment and billing information below is correct." Below this, there are three sections: "CBOSS Payment Summary", "Payment Information", and "Billing Information". The "CBOSS Payment Summary" section shows a total of \$100.00. The "Payment Information" section includes fields for Credit Card Number, Expiration Month, Expiration Year, and Card Security Code. The "Billing Information" section includes fields for First Name, Last Business Name, Address Line 1, City, Zip/Postal Code, Middle Name, Phone, Address Line 2, State/Province/Region, and Country. The "Confirm" button is circled in red. A "Back" button is also visible. At the bottom, there is a "Technical Support" link and a copyright notice for CBOSS, Inc.

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

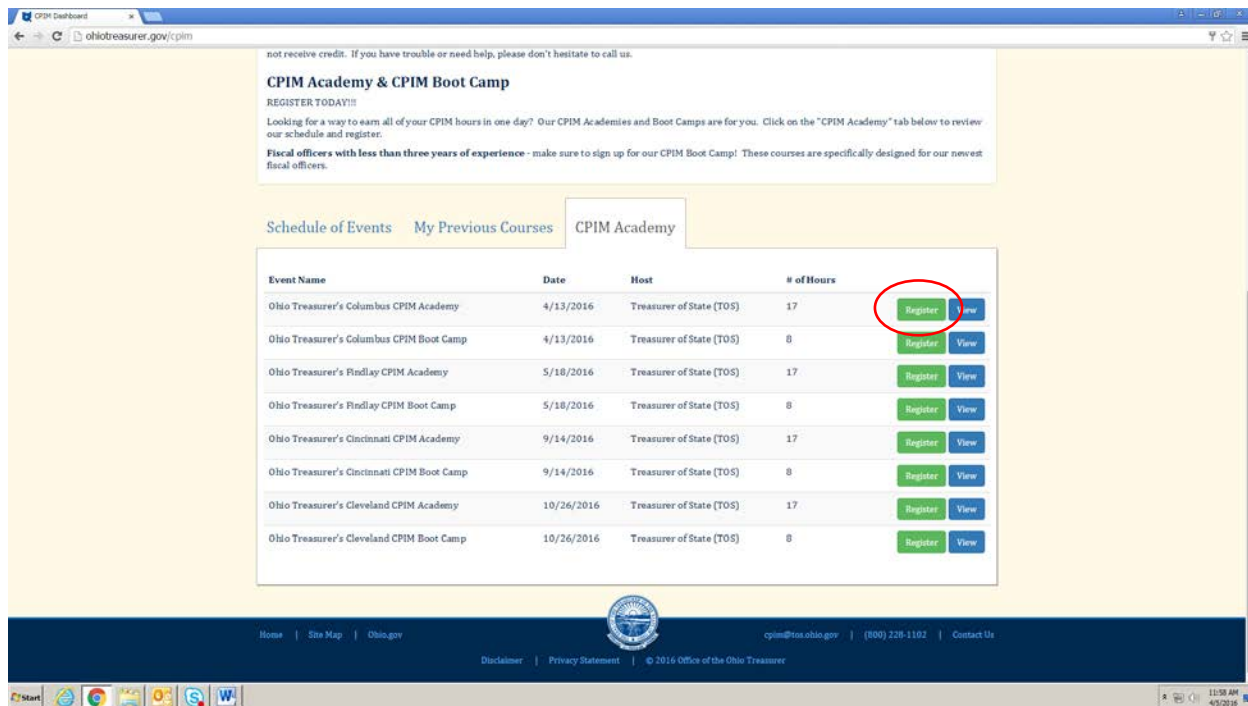


CPIM Academy

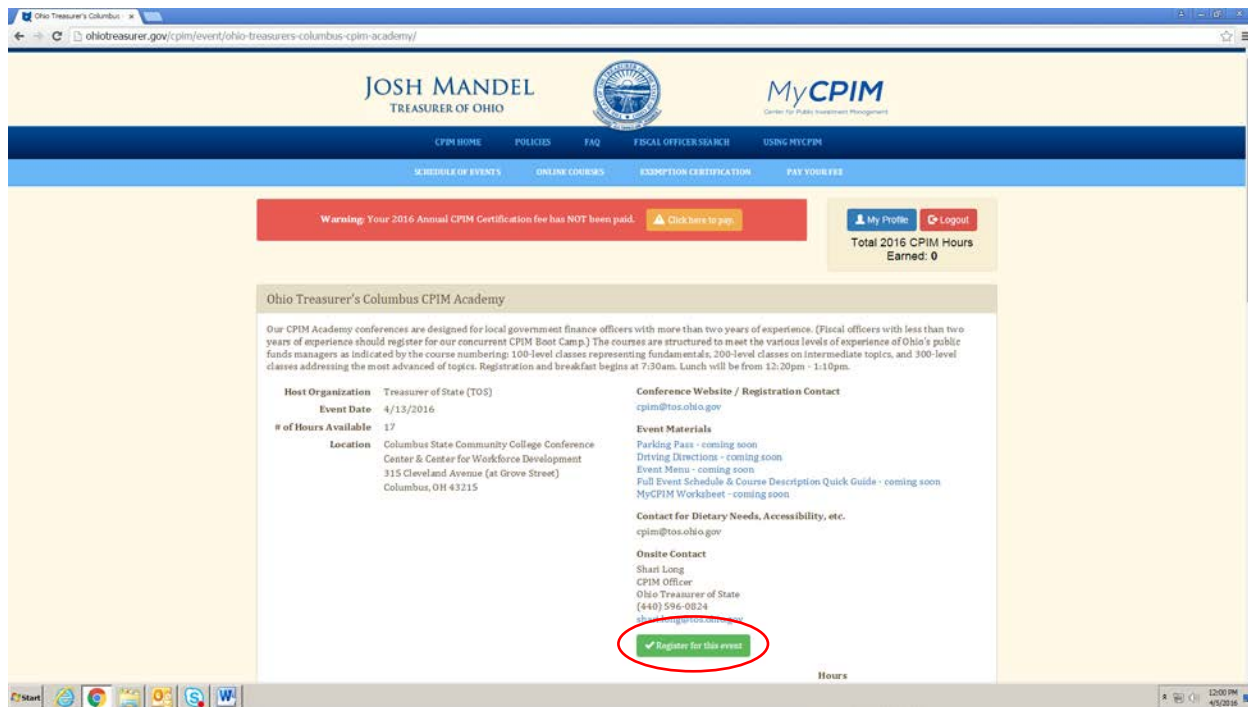
- On the homepage, click **CPIM Academy**. This is a listing of all of the TOS hosted CPIM Academies and Boot Camps happening across the state. They are also on the **Schedule of Events**, but this tab simply provides quicker access to them.



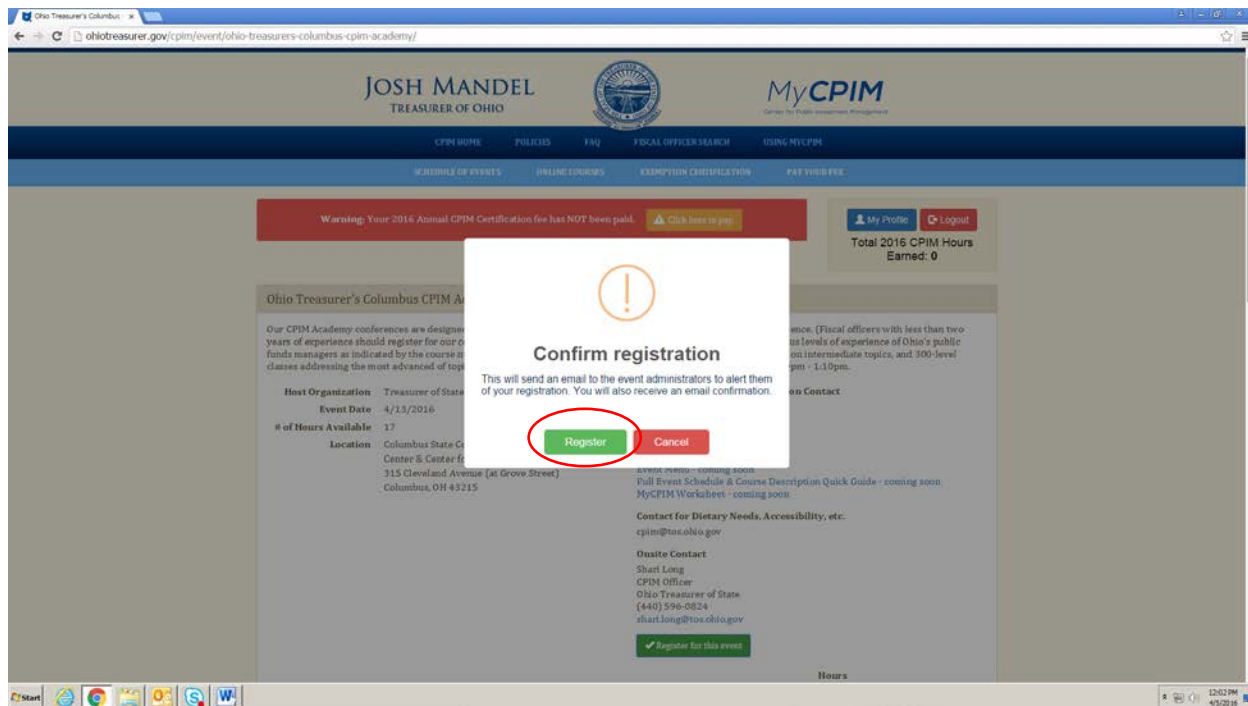
- In order to register for a TOS hosted event, you must first be logged into MyCPIM. **Please review page 16 for instructions.** Once you're logged in, a green button will appear next to all TOS CPIM events. Click **Register**.



- 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 12:30pm - 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 Amendolea, CFA, Ohio Treasurer of State	1
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
INV 221: Principles of Investment Accounting	4/13/2016 9:30 AM - 10:30 AM	Dennis Yacobi, United American Capital Corporation, Stan Bahorek, Columbus City Schools	1
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

- 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

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TRANS 301: Getting the Most Out of OhioCheckbook.com	4/13/2016 9:30 AM - 10:30 AM	OpenGov	1

- 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.

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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 (circled in red):
[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

[Register for this event.](#)

Course Name	Date/Time	Speaker(s)	Hours Available
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TRANS 301: Getting the Most Out of OhioCheckbook.com	4/13/2016 9:30 AM - 10:30 AM	OpenGov	1 Report Hours View

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.

Ohio Treasurer's Columbus CPIM Academy

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[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

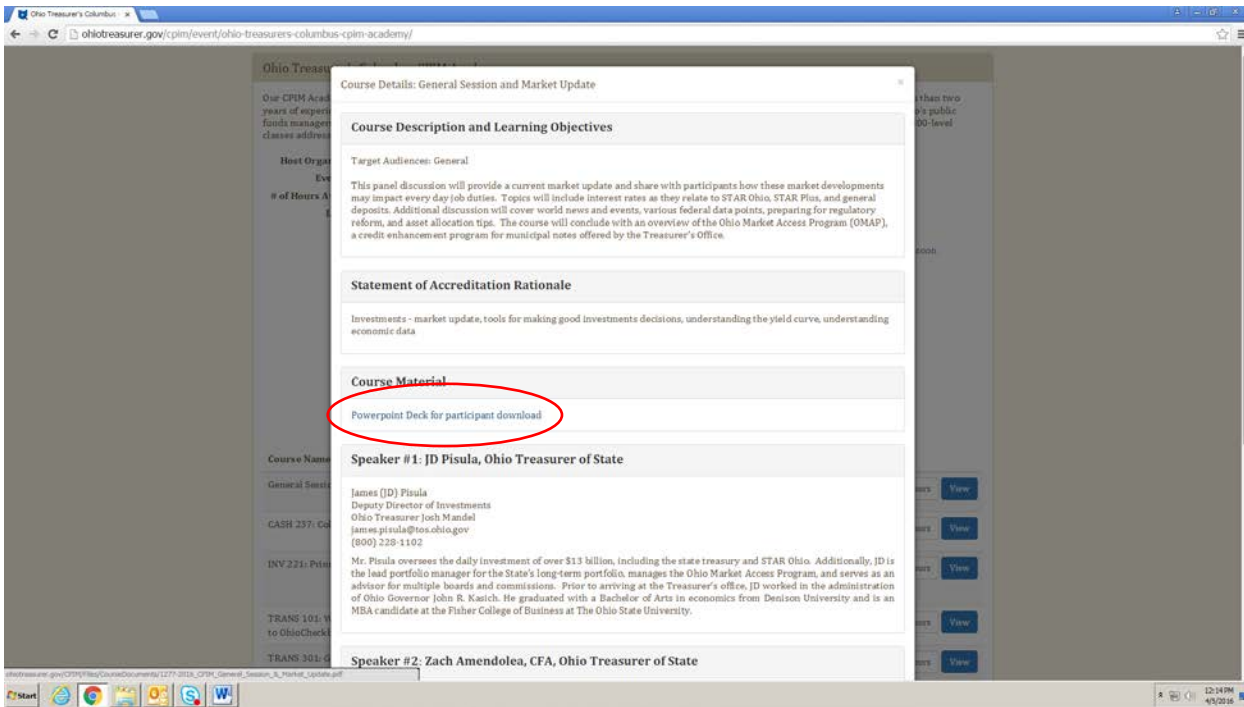
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[Register for this event.](#)

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TRANS 301: Getting the Most Out of OhioCheckbook.com	4/13/2016 9:30 AM - 10:30 AM	OpenGov	1 Report Hours View

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.

MyCPIM Worksheet
Ohio Library Council Training - March 31 - April 1, 2016

The Ohio Treasurer's Center for Public Investment Management is proud to announce the implementation of MyCPIM, a one-stop, online reporting system to service your CPIM needs. MyCPIM is your primary destination to report CPIM hours, pay your Annual CPIM Certification Fee, download annual Certificates of Completion once your requirements are complete, search a full list of CPIM education opportunities statewide, and more. This system requires all fiscal officers to log in via the internet using the email address previously provided to CPIM. If you have not provided CPIM with your email address in the past, please call us at (800) 228-1102 so that we may complete your profile prior to your initial log into MyCPIM. This email address should be unique to you. Please do not provide an email address that you share with another individual.

Hours must be reported by 5:00pm on April 6, 2016. Hours will not be accepted after this time.

Step 1: Go to cpim.ohio.gov and log in by clicking on the green MyCPIM Login button using the credentials below:

USER NAME: the email address you have previously provided to CPIM
PASSWORD: CPIM123

Upon initial login, MyCPIM will ask you to send yourself an email to verify your identity and create a new password. Log back in using your new password and update your profile. Click SAVE and you'll be back to your MyCPIM homepage.

Step 2: On your MyCPIM homepage, scroll down to "Schedule of Events" and click "View" next to this event listing.

Step 3: Scroll down to the course listing and click on the green "Report Hours" next to the course you attended.

TIP: The "Report Hours" button next to this course will appear in green only when the window is open - after the course and time has passed and before 5:00pm on April 6, 2016. It will appear in white when the window has yet to open or has closed.

Step 4: Fill out the form for the course including the hour(s) attended, the MyCPIM password confirming your attendance, and the workshop. Click "Report Hours."

TIP: To help accurately and consistently report your hours, a green confirmation box will appear at the top of all hours attended and course password confirmation submitted. A green confirmation box will appear in the bottom right corner of the window, you will receive an email confirmation of your reported hours for this course and on the MyCPIM homepage under the "Hours Earned" section. Previous Courses' tab. This course listing will appear with "Pending Organization Approval" in the "Hours Earned" column.

Time	Course Name	No. Sessions	No. Attended	Password
March 31				
8:00am - 10:00am	Ohio - Community Outreach and Long-Term Fiscal Strategies Facing Public Libraries	1.0		
1:00pm - 2:00pm	Public Law Study	1.0		
2:00pm - 4:00pm	Public Law Study	1.0		
4:00pm - 5:00pm	Ohio Financial Review	1.0		
April 1				
8:00am - 10:00am	Public Law Study	1.0		
10:00am - 12:00pm	Public Law Study	1.0		
12:00pm - 1:00pm	Public Law Study	1.0		
1:00pm - 2:00pm	Ohio Financial Review	1.0		

Step 5: REPEAT steps 1 and 4 for the other courses you attended.

TIP: If you have an wireless device or internet access with you at the conference, we suggest reporting your hours for each course completed during each break immediately following the course.

Step 6: If you are seeking CPIM certification (i.e., that you want credit for these hours), you are required to pay an Annual CPIM Certification Fee of \$100. If you have paid your fee, a green box will appear at the top of your MyCPIM screen. If you have not paid, a red box will appear. Click on it to follow the payment instructions. You will not receive an invoice. If you do not pay the Annual CPIM Certification Fee before 12/31/2016, you will \$100 receive CPIM hours for these courses.

Please don't hesitate to call us if you need help logging into or navigating MyCPIM at (800) 228-1102.

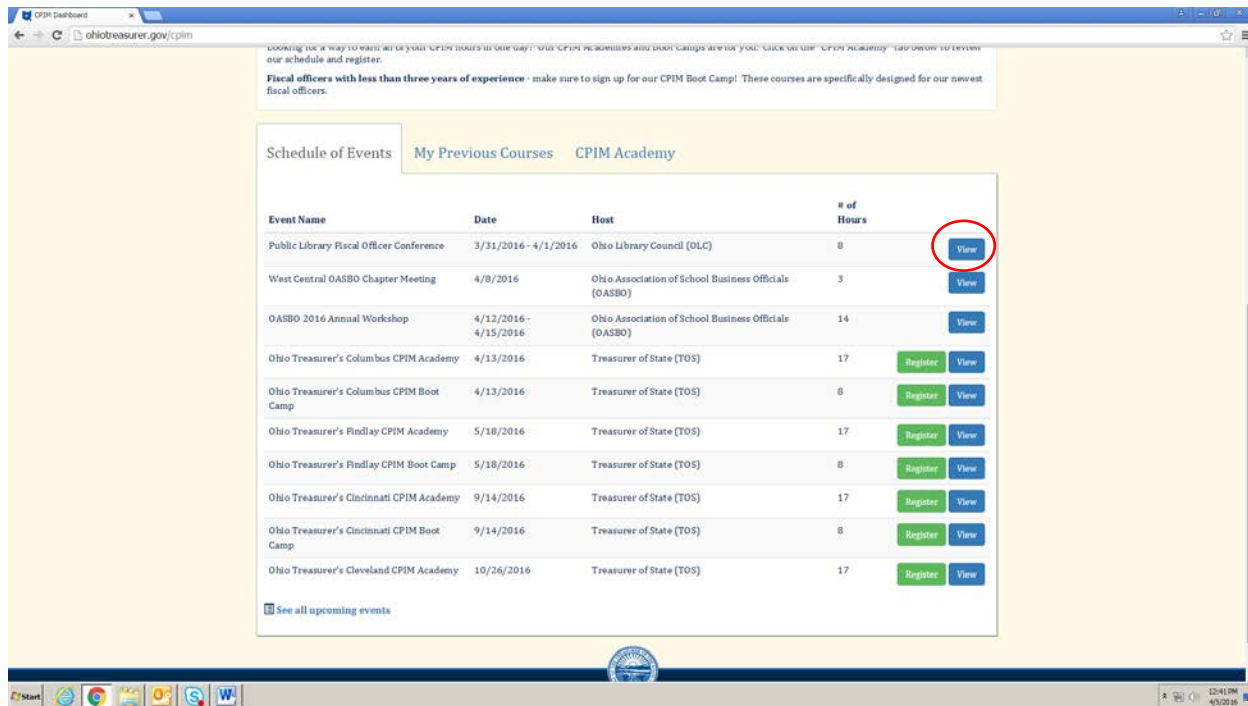
NOTE: MyCPIM is mobile friendly. We encourage you to report your hours on the fly right from your mobile phone or tablet, if you have either with you at the conference, so that there's nothing more to do once you leave the conference. Continue reading for instructions.

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.

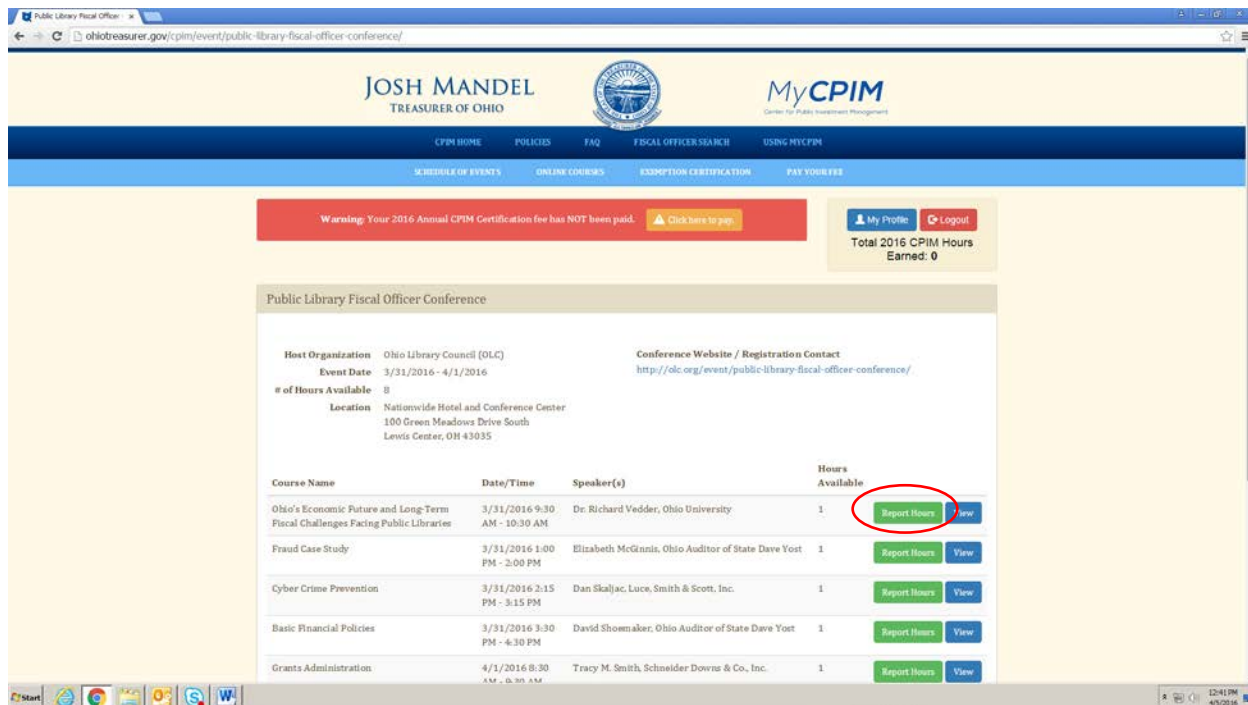
NOTE: The window to report your hours is once the course is complete until 5:00pm on the third business day following the conference close. For example, for hours earned at a conference that goes from Thursday, March 31st to Friday, April 1st – you have until Wednesday, April 6th to report those hours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

You are reporting hours for Ohio's Economic Future and Long-Term Fiscal Challenges Facing Public Libraries

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@tor.ohio.gov

Credits **Max: 1**
0.00

What is the password?

How well did the presenter explain the course content?
- Select -

Comments

How well did the course achieve its stated objectives?
- Select -

Comments

Was the content of this session applicable to your work for your entity?
- Select -

Comments

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.

You are reporting hours for Ohio's Economic Future and Long-Term Fiscal Challenges Facing Public Libraries

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@tor.ohio.gov

Credits **Max: 1**
0.00

What is the password?

How well did the presenter explain the course content?
- Select -

Comments

How well did the course achieve its stated objectives?
- Select -

Comments

Was the content of this session applicable to your work for your entity?
- Select -

Comments

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**.

You are reporting hours for

ohiotreasurer.gov/cpm/event/report-hours/ohios-economic-future-and-long-term-fiscal-challenges-facing-public-libraries/

1.00

What is the password?

How well did the presenter explain the course content?

Well

Comments

How well did the course achieve its stated objectives?

Well

Comments

Was the content of this session applicable to your work for your entity?

Yes

Comments

Back to Event Search

Report Hours

Home | Site Map | Ohio.gov

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

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- 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.**

Public Library Fiscal Officer

ohiotreasurer.gov/cpm/event/public-library-fiscal-officer-conference/

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 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

Public Library Fiscal Officer Conference

Host Organization: Ohio Library Council (OLC)
Event Date: 3/31/2016 - 4/1/2016
of Hours Available: 8
Location: Nationwide Hotel and Conference Center
100 Green Meadows Drive South
Levin Center, OH 43035

Conference Website / Registration Contact:
http://olc.org/event/public-library-fiscal-officer-conference/

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 Skalljac, Luce, 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

✓ Your hours have been reported. Thank!

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.

The screenshot shows the MyCPIM homepage. At the top, there is a header with the logos for Josh Mandel, Treasurer of Ohio, and MyCPIM. Below the header is a navigation bar with several links: **CPIM HOME** (circled in red), POLICIES, FAQ, FISCAL OFFICER SEARCH, and USING MYCPIM. Below the navigation bar is a sub-navigation bar with links: SCHEDULE OF EVENTS, ONLINE COURSES, EXEMPTION CERTIFICATION, and PAY YOUR FEE. A warning banner at the top states: "Warning: Your 2016 Annual CPIM Certification fee has NOT been paid. Click here to pay." To the right of the warning banner are links for "My Profile" and "Logout", and a box showing "Total 2016 CPIM Hours Earned: 0". The main content area is titled "Public Library Fiscal Officer Conference" and contains a table with course information.

Course Name	Date/Time	Speaker(s)	Hours Available
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
Fraud Case Study	3/31/2016 1:00 PM - 2:00 PM	Elizabeth McGinnis, Ohio Auditor of State Dave Yost	1
Cyber Crime Prevention	3/31/2016 2:15 PM - 3:15 PM	Dan Skajjac, Luce, Smith & Scott, Inc.	1
Basic Financial Policies	3/31/2016 3:30 PM - 4:30 PM	David Shoemaker, Ohio Auditor of State Dave Yost	1
Grants Administration	4/1/2016 8:30 AM - 9:30 AM	Tracy M. Smith, Schneider Downs & Co., Inc.	1

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

The screenshot shows the MyCPIM homepage. The navigation bar and sub-navigation bar are the same as in the previous screenshot. The warning banner and user information are also present. The main content area is titled "Navigating MyCPIM" and contains a section for "REPORTING HOURS" with a reminder to report hours by 5:00pm on the third business day following a CPIM accredited event. Below this is a section for "CPIM Academy & CPIM Boot Camp" with a "REGISTER TODAY!!!" link. At the bottom, there is a "Schedule of Events" section with a search bar and a link for "My Previous Courses" (circled in red). The search bar contains the year "2016" and a "Go" button.

- 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 with the 'Schedule of Events' tab selected. The year is set to 2016. The total hours earned is 0 out of 6 required. The table lists several events, with the status 'Pending Organization Approval' circled in red for the 'Public Library Fiscal Officer Conference'.

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.

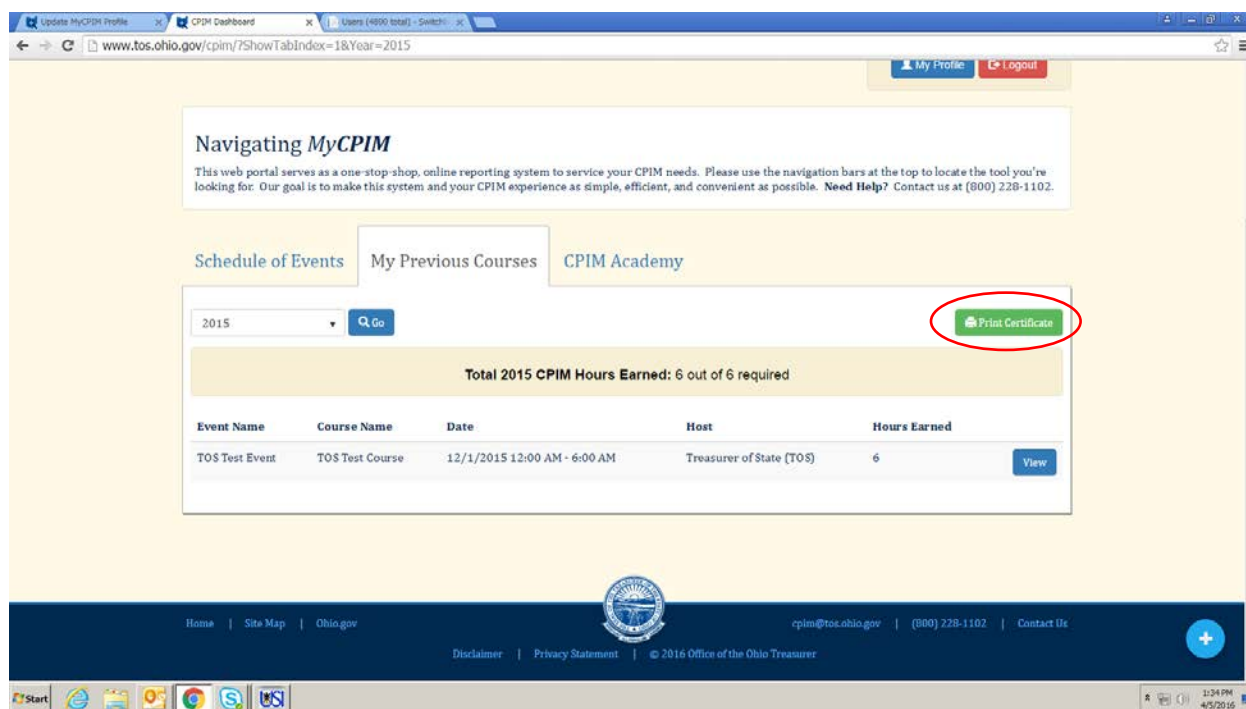
The screenshot shows the CPIM Dashboard with the 'Schedule of Events' tab selected. The year is set to 2016. The total hours earned is 0 out of 6 required. The table lists several events, with the status 'Pending Payment' circled in red for the 'COAGA Training'.

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
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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: 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**.

The screenshot shows the MyCPIM dashboard interface. At the top, there are navigation tabs: "Update MyCPIM Profile", "CPIM Dashboard", and "Users (4890 total) - Switch". The main content area has a header "Navigating MyCPIM" with a sub-header "This web portal serves as a one-stop-shop, online reporting system to service your CPIM needs. Please use the navigation bars at the top to locate the tool you're looking for. 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." Below this, there are three tabs: "Schedule of Events", "My Previous Courses", and "CPIM Academy". Under "Schedule of Events", there is a dropdown menu showing "2015" and a "Go" button. A "Print Certificate" button is also visible. Below the dropdown, a summary bar states "Total 2015 CPIM Hours Earned: 6 out of 6 required". A table lists the event details:

Event Name	Course Name	Date	Host	Hours Earned
TOS Test Event	TOS Test Course	12/1/2015 12:00 AM - 6:00 AM	Treasurer of State (TOS)	6

The footer contains links for "Home", "Site Map", "Ohio.gov", "cpim@tos.ohio.gov", "(800) 228-1102", and "Contact Us". It also includes a "Disclaimer", "Privacy Statement", and "© 2016 Office of the Ohio Treasurer". The Windows taskbar at the bottom shows the Start button and several application icons.

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

FAQs

Coming soon

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