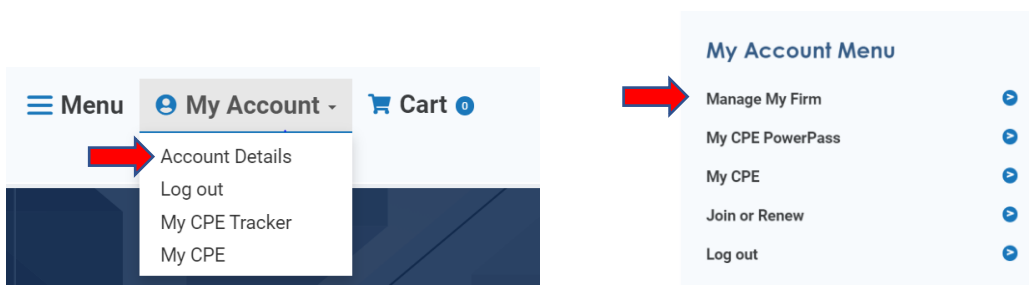


Firm Admin Portal Instructions

Logging into the Firm Admin Centre

1. Go to: FICPA.org
2. Log in: at top of the screen and enter your email & password
If you have any issues including resetting your password, please let us know and we will update your login credentials. Please do not set up a new account.
3. My Account/Account Details allows you access to your Profile where you can update personal information including your email preferences.
4. In Account Details, choose **Manage My Firm** from My Account Menu
Note: as the firm admin, you have access to the firm portal and management tools

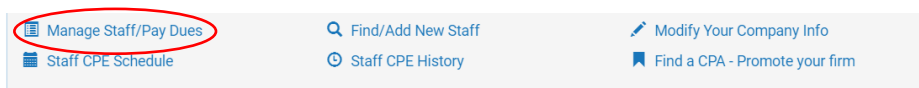


Firm Admin Centre Tools - Manage My Firm

How to Update Roster: The main office will appear first with branch offices listed alphabetically by city. You will need to update each office separately.

1. Click **Manage Staff/Pay Dues**
2. Click on **Members in Good Standing** to display Active Members (allows you to view or update each profile or delete from your roster)
3. Click **Nonmembers** to display staff linked to your firm that are not Active Members
4. **+Find/Add Staff** allows you to search current members in our database to add to your Nonmember list. If person does not appear in search, you can **+Create New Staff** record.

Note: If you would like to activate memberships for any of the Nonmembers, please email firmconciierge@ficpa.org. We will process and call you for payment if applicable. We are in the process of adding this functionality on-line.



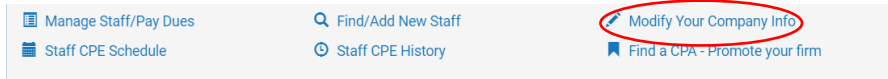
How to Pay Renewals: We open renewals for the upcoming membership year (July 1 – June 30th) mid-May giving you plenty of notice to update your roster.

1. In **Manage My Firm**, choose the Firm location (if multiple offices)
2. Click on **Manage Staff/Pay Dues**
3. Scroll down and Click **Pay Membership Dues** for on-line payments.
Note: You can pay all offices at once by leaving each office in the cart.

4. [Download Membership Renewal Invoice](#) allows you to print invoice for a check payment.

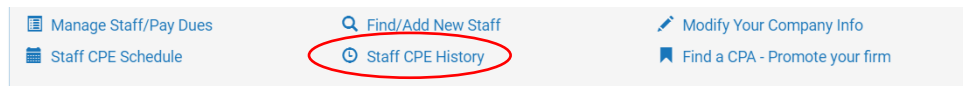
How to Update your Firms Information: Make changes to firm's address, name, phone number, email etc.

1. In **Manage My Firm**, choose the Firm location (if multiple offices)
2. Click on [Modify Your Company Info](#)



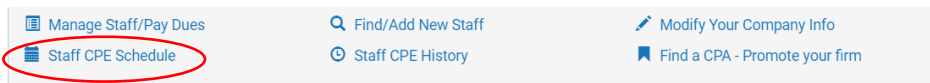
How to view staff's CPE History & print Certificates of Attendance :

1. In **Manage My Firm**, choose the Firm location of staff member
2. Click on [Staff CPE History](#)
3. Choose staff you would like to view
Note: CPE history defaults to member's current reporting period with option to change the dates.
4. [Download Certificate of Attendance](#) to print
Note: You can also add non-FICPA courses to keep CPE in one place



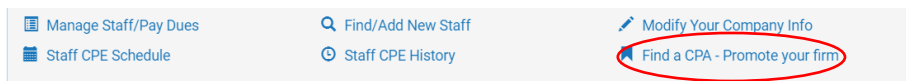
How to view Staff CPE Schedules:

1. In **Manage My Firm**, choose the Firm location
2. Click [Staff CPE Schedule](#) – staff is listed in alphabetical order with their upcoming Online, In-Person & On-Demand courses



How to add your firm to Find a CPA: This is open to a public search.

1. In **Manage My Firm**, choose the Firm location
2. Click [Find a CPA – Promote your firm](#)
3. Fill out contact information and specific offerings.



How to register staff for CPE & events:

Note: **Volume discounts** are offered on most events when 5 or more staff attend the same event. We will need to apply the discount manually until such time that functionality is put in place. Email us with the staff information & event and we will call you back to process the registration.

1. In **Manage My Firm**, click [Register Staff for CPE](#)
2. Search for event & click Register Now
3. Click Register Employees
4. Select Employees you would like to register
5. Click Add to Cart
6. Click Checkout after verifying information

Firm Admin Centre Tools

Welcome to the Firm Administrator Portal.

Our records indicate that you are an authorized Firm Administrator.

The admin tools allow you to:



- **Update office roster(s)** - Manage each office separately below.
- **Register Staff for CPE.**
- **Pay Member Dues** - *Select by office below.*

How to access Career Center: We partner with Naylor/Boxwood locally and across the Financial Job Exchange (FJE) <https://Careers.ficpa.org>

1. List internships – complimentary
2. List open positions – see Pricing for package options
-includes resume' search

Firm Admin Centre Tools

Welcome to the Firm Administrator Portal.

Our records indicate that you are an authorized Firm Administrator.

The admin tools allow you to:



- **Update office roster(s)** - Manage each office separately below.
- **Register Staff for CPE.**
- **Pay Member Dues** - *Select by office below.*
- **Edit Member Profile.**
- **CPE History** - View and manage the CPE history for all your employees
- **View staff's upcoming CPE Schedules.**
- **Promote your company in the "Find a CPA" public listing**
- **Update Office(s) Information.**
- **Submit/Update an Internship**

Firm Admin Cheat Sheet Items

1. **Newly Certified** (within) 3 months of being certified are awarded a half off membership
Note: all Florida certified will be in our database
2. **New Members** are prorated by months remaining in our membership year.
3. **Non-CPA Firm Admins/Office Managers** have complimentary memberships.
4. **Volume discounts** apply to most events with 5+ registrants to the same event.
5. **Internship listings** are free.
6. **Firm 100** firms are automatically listed on our website. See more information at: www.ficpa.org - Menu – Membership – Firm Admin Centre

Disclaimer: We are in the process of adding and updating functionality since our new website launch on September 14th, 2020. We would love to hear your feedback, questions or suggestions. Please email: firmconciierge@ficpa.org.