



Firm Portal Instructions

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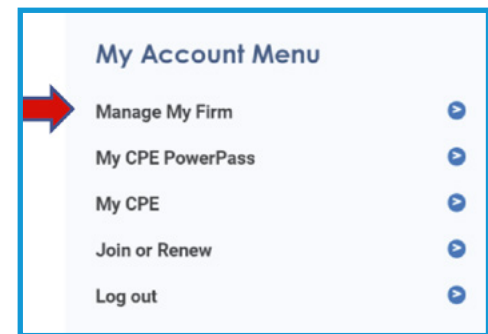
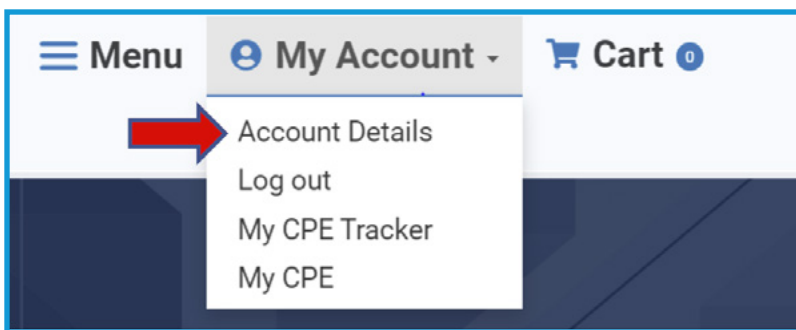
How to Log into the Firm Admin Centre

1. Go to: [FICPA.org](https://www.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.

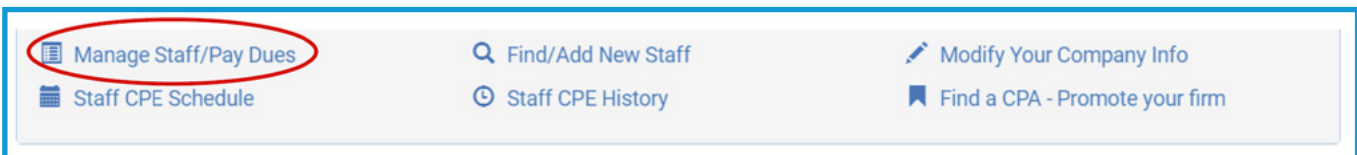


4. In Account Details, choose Manage My Firm from My Account Menu.

Updating Your 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

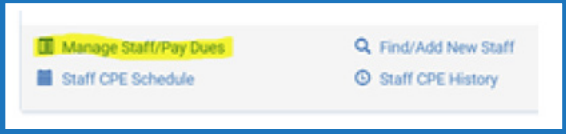
(This allows you to view or update each profile or delete from your roster.)

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 a person does not appear in search, you can Create New Staff.

How to Upgrade a Nonmember

1. Click on **Manage Staff/Pay Dues** on selected office location.



A screenshot of a software menu with a blue border. It contains four items: 'Manage Staff/Pay Dues' (highlighted in yellow), 'Find/Add New Staff' (with a magnifying glass icon), 'Staff CPE Schedule' (with a blue square icon), and 'Staff CPE History' (with a circular arrow icon).

2. Choose option 4, Upgrade Nonmembers to Member, and a list of nonmembers will appear.

3. Select those you would like to activate, click **Upgrade to Member** in Account Details, and choose Manage My Firm from My Account Menu.



A blue button with rounded corners and a white shopping cart icon, containing the text 'Upgrade to Member'.

Note: If an individual is not licensed, additional information will be needed to determine membership type. **Click Edit Info on the right.**

The certification information section will default to Not Certified/Not Licensed. Please choose the appropriate member type. If individual is licensed outside of FL, fill in appropriate out of State license information.

Additional Information is Needed Before Upgrade is Possible

The following Nonmembers require additional information to determine which category of membership. Please click Edit Info next to name and fill out complete information under Certification Information section.

ID	Name	Email	Certification #	Membership Status	Action
109312	Jennifer N Allen (109312)	jennifer@ficpa.org		Non-Member	Edit Info

Note: Those licensed in Florida will be in our database already.

4. Scroll to the bottom and click **Save**.

5. Select your individuals again and choose **'Upgrade to Member.'** They will be added to your cart.



How to Pay Renewals

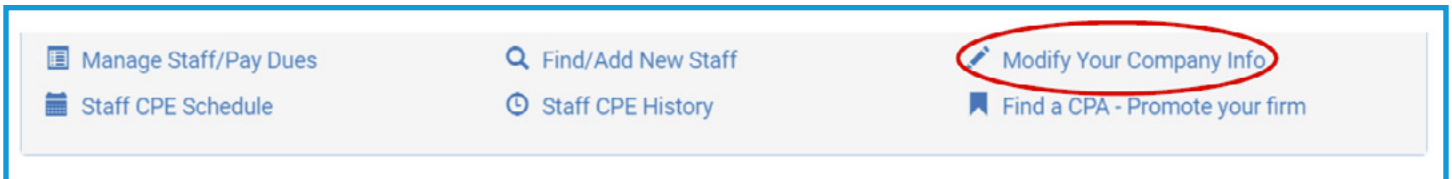
We open renewals for the upcoming membership year (July 1 – June 30) in mid-May, giving you plenty of notice to update your roster.

1. In **Manage My Firm**, choose your Firm location.
2. Click on **Manage Staff/Pay Dues**.
3. Scroll down and click **Pay Membership Dues** for online payments.
Note: You can pay for all offices at once by leaving each office in the cart.
4. **Download Membership Renewal Invoice** allows you to print an invoice for a check payment.
(Please make any roster updates online prior to printing your invoice.)

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.
2. Click on **Modify Your Company Info**.



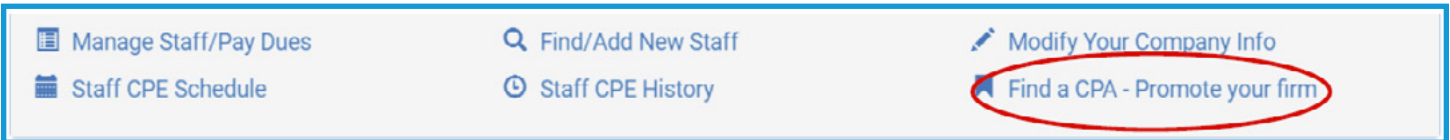
Note: if your firm participates in Peer Review and there are any changes to your firm name, address or structure, please contact Member Services and we will help you update the information with us and with AICPA.

How to advertise your firm in Find a CPA

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**.

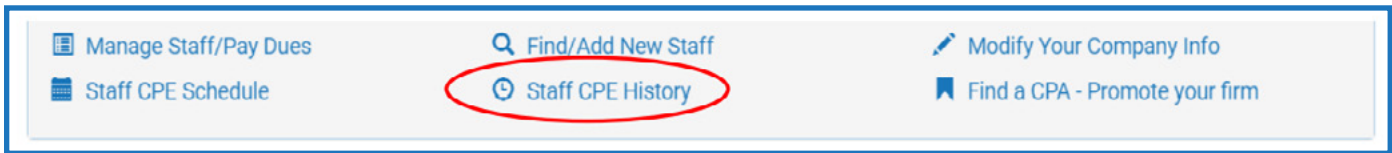


3. Fill out contact information and specific offerings.

How to Manage & Register Staff for CPE

CPE History & 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.

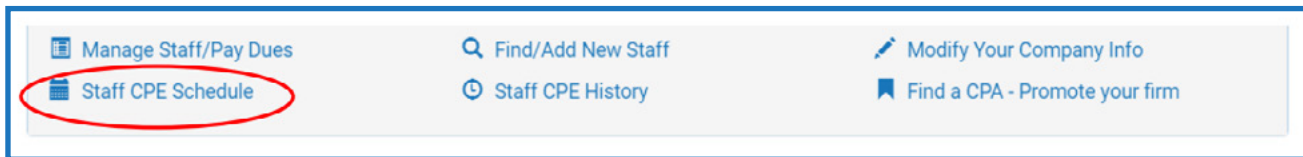
Note: CPE history defaults to member's current reporting period with option to change the dates.

4. Download Certificate of Attendance to print.

Note: Non-FICPA courses can be added to staff's individual CPE Trackers.

Staff CPE Schedules

1. In Manage My Firm, choose the Firm location
2. Click Staff CPE Schedule.



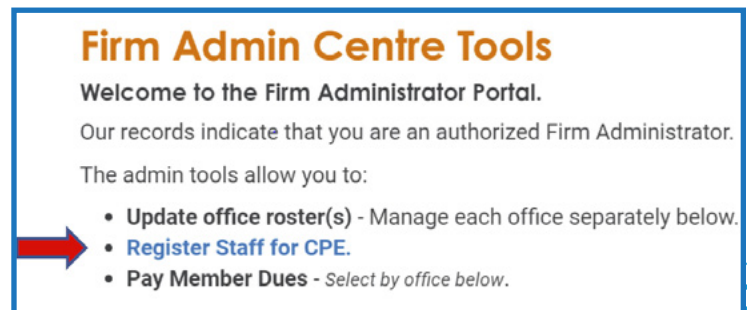
Staff is listed in alphabetical order with their upcoming online, in-person and on-demand courses.

Staff for CPE & events

Note: Group discounts are offered on most events when five or more staff members attend the same event. We will need to apply the discount manually until such time as an automatic functionality is put in place.

Please email us with the staff names for the 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 and 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.





How to access the 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
3. Includes resume search

Firm Admin Cheat Sheet Items

1. Newly certified CPAs are awarded a half-off membership within 3 months of being certified.

Note: All Florida certified CPAs will be in our database.

2. New Members are charged a prorated amount by months remaining in our membership year.

3. Non-CPA Firm Admins/Office Managers receive complimentary memberships.

4. Group Discounts apply to FICPA Seminars, Webinars & Conferences

(with the exception of International Tax Conference):

5-7 registrants for same event = Save 15%

8+ registrants for same event = Save 20%

[Please fill out Group Registration Form](#) and email to firmconciierge@ficpa.org.

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

7. Non-CPA Firm Administrators can take advantage of all benefits.