CCMS - Candidate Management System Quick Start Guide

CCMS - Certification Candidate Management System Quick Start Guide

The Institute of Internal Auditors | Global

Table of Contents

Overview 3
CCMS Technical Requirements 3
Getting Started 4
- Account Creation 4
- Login 5
- Complete Profile 5

CCMS Home Page 6
- Menu Bar 7
- Candidate Profile 7
- Language 8
- System Timeout 9

Left Navigation Checklist 10
Update My Profile 11
Help/Case Management 12
Candidate Suppression 13
- Suppression Alert 13

Applying for a New Certification 14
- Credit Card 14
- Quote Me 14
- Wire Transfers 14
- Ethical Standing 15
- Proof of Education 15
- Proof of Identification 16
- Character Reference 17
- Special Accommodations 18
- Review and Submit 18
- Rejected/Approved Documents and Notifications 19

Proof of Experience 20

Enter Work Experience 20
Verification of Experience 22
Exam Registration and Scheduling 23
Registration 23
Schedule an Exam 24
Local Test Center 26
Scheduling Test at a Home or Office 35
Run Precheck 36
Exam Results 41
Certification Granted 41
Sign Out 42
Glossary 43
Revision History/Document Version 43

CCMS - Certification Candidate Management System Quick Start Guide

Overview

This is a Quick Start Guide to the Certification Candidate Management System (CCMS).

CCMS Technical Requirements

- CCMS is designed to operate in a browser environment. The supported browsers are:
  - Chrome
  - Firefox
  - Edge
- Printers: Any standard printer configured to the candidate's computer will work to print a receipt.
- Internet Connection: A regular internet connection will suffice in order to access the CCMS portal.

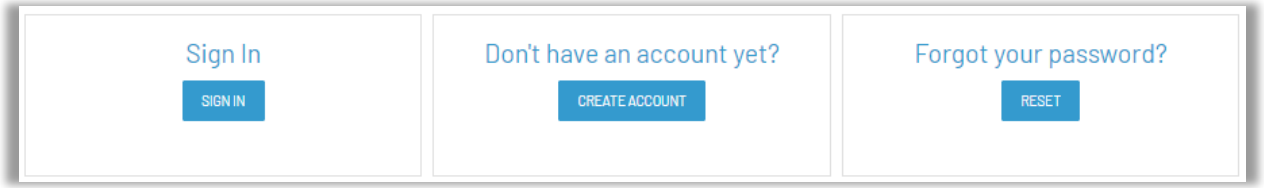
CCMS - Certification Candidate Management System Quick Start Guide

Getting Started

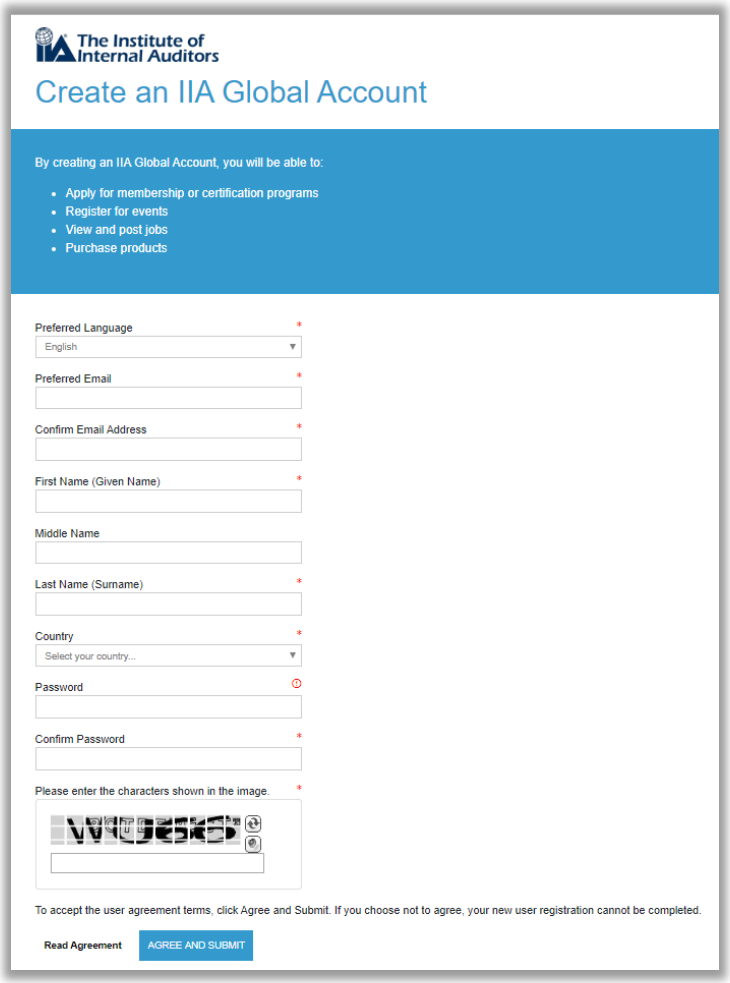
Account Creation

To sign in to CCMS, create an account.

- Access www.theiia.org/ccms and click **Create Account**.



Create an IIA Global Account page is displayed. Populate the information below:

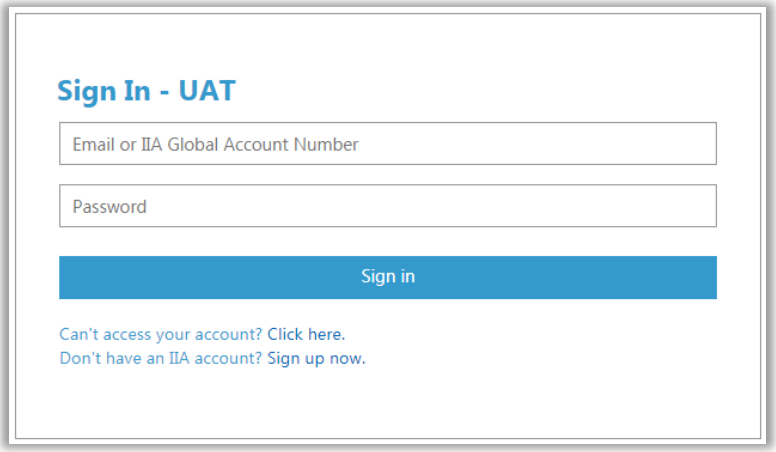


- Click **Agree and Submit.**
- Click *You may now continue with your certification application* link.

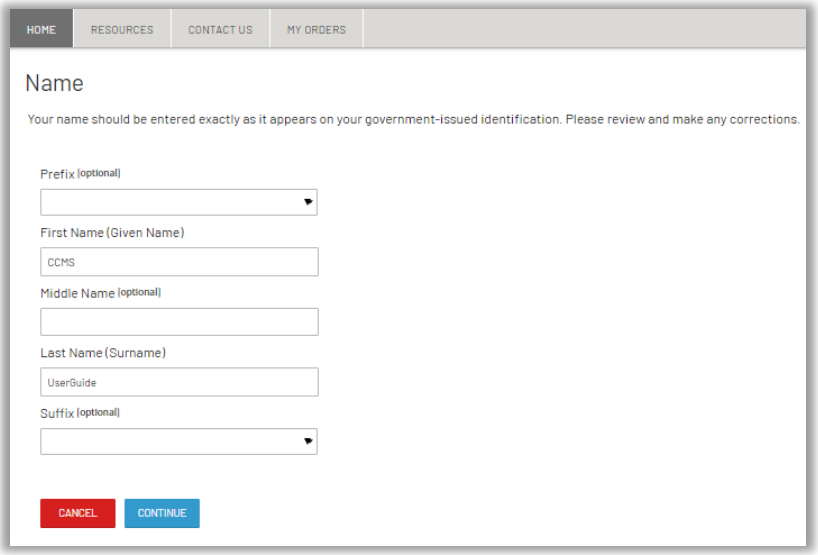
Login

Perform the following steps to login to CCMS:

- Click **Sign In** on the CCMS Login page.
- Enter your Email or IIA Global Account Number.
- Enter your Password.
- Click **Sign In.**



Complete Profile



- Once logged in, complete your profile.
- Populate the following fields and click **Continue.**

- Continue to Privacy Statement page, Phone Number page, and Billing Address Page.
- Click **Continue.**

NOTE: The Billing Address field requirements are dependent on which Country is entered during Account Creation.

If United States is the Country selected, the following Billing Address fields are required:

- Address Line 1
- City
- State/Province
- Postal Code

If a different Country is selected (i.e. Japan) only the following Billing Address fields are required:

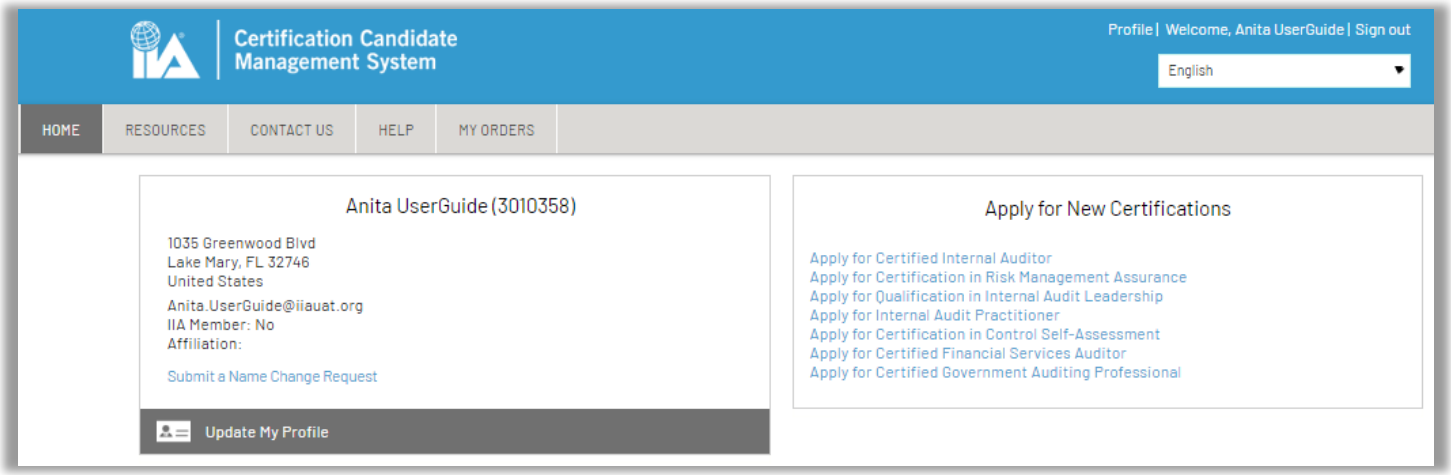
- Address Line 1
- City

Shipping Address page is displayed.

- Select **Enter Address** to enter a Shipping Address that is different from the Billing Address or Select **Same as Billing Address** to populate Shipping Address with the same address as Billing. Click **Continue.**

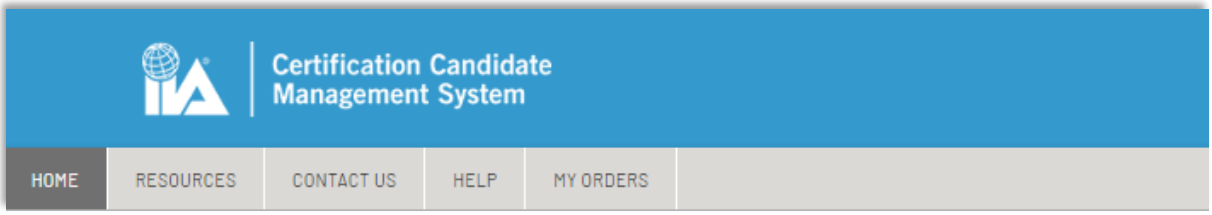
CCMS Home Page

Certificate Candidate Management System (CCMS) Home page is displayed.



Menu Bar

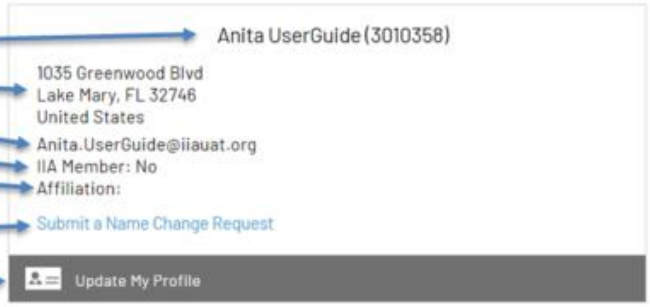
At the top of CCMS a menu bar or ribbon bar is displayed that contains a choice of functions such as Home, Resources, Contact Us, Help, and My Orders.



Candidate Profile

On the Home Page under menu bar, the following is displayed for candidate profile:

- Candidate's First Name Last Name and GAN (Global Account Number)
- Candidate's Address
- Candidates' Email Address
- IIA Member: Yes/No
- Affiliation: (if applicable)
- Submit a Name Change Request
- Update my Profile

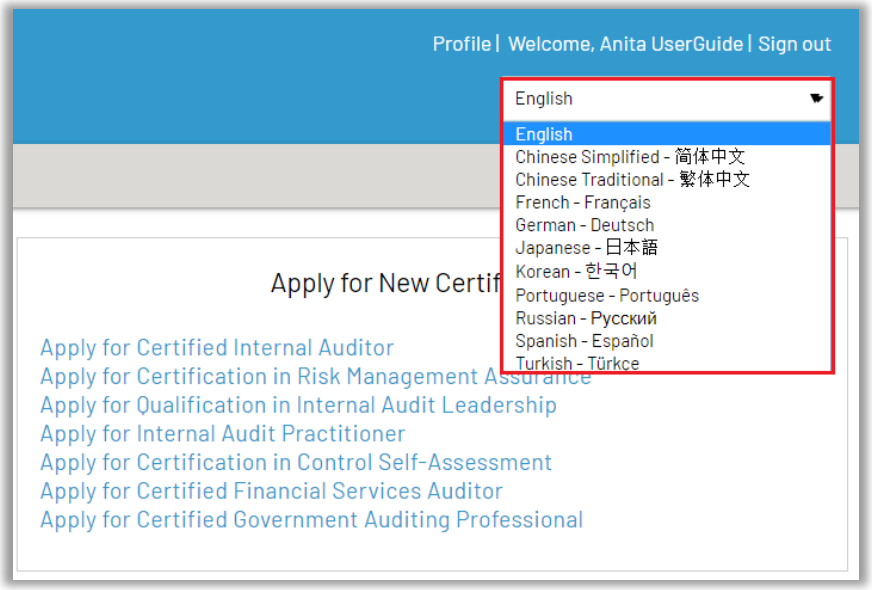


To the right under the menu bar are the links to **Apply for New Certifications.**

CCMS - Certification Candidate Management System Quick Start Guide

Language

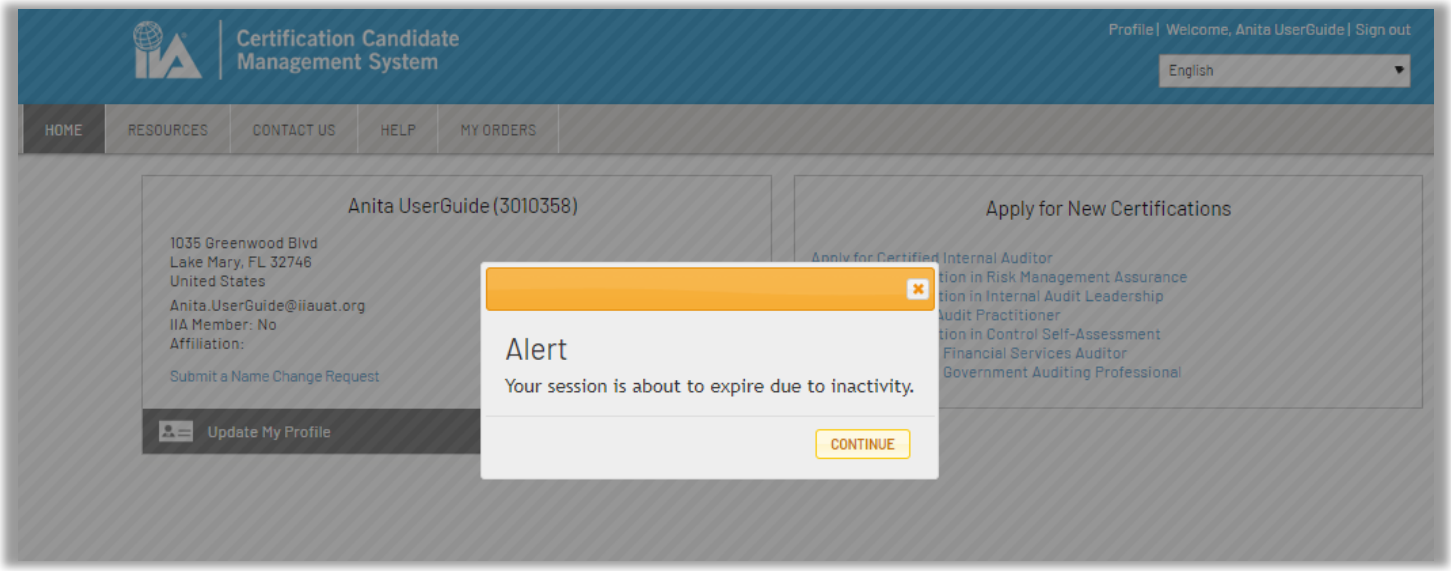
At the top right of your browser window is the Language drop-down. Default is English unless a different language was chosen during Account Creation.



To select a Language preference, simply select an applicable language from drop-down and the page will translate to the selected language.

System Timeout

If CCMS has been idle for 15 minutes, the system will display the following Alert message within the browser window. Click **Continue** to continue working with your session.

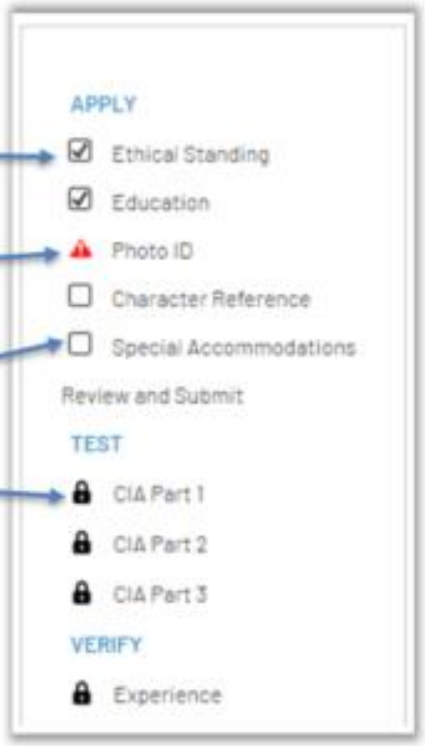


If you do not click **Continue,** the system will automatically log you off security purposes.

Left Navigation Checklist

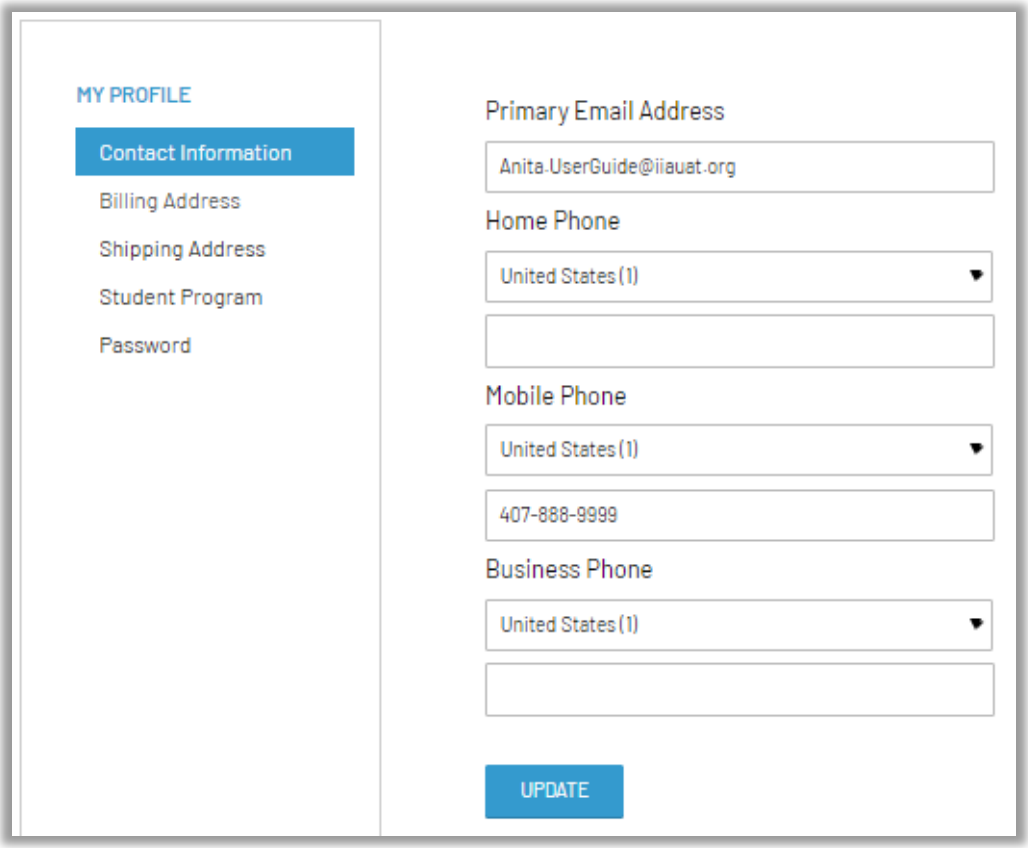
Throughout the application process, during the examination period and completing a program's exit requirements, you will interact with the left navigation checklist. The following icons indicate the status of a step in the program:

- **Checked Box** = Step complete but in pending status.
- **Alert** = Requires candidate attention.
- **Open Checkbox** = Enabled step.
- **Lock** = Step not enabled or approved.



Update My Profile

- On the CCMS Home Page, click **Update My Profile** to update your profile.



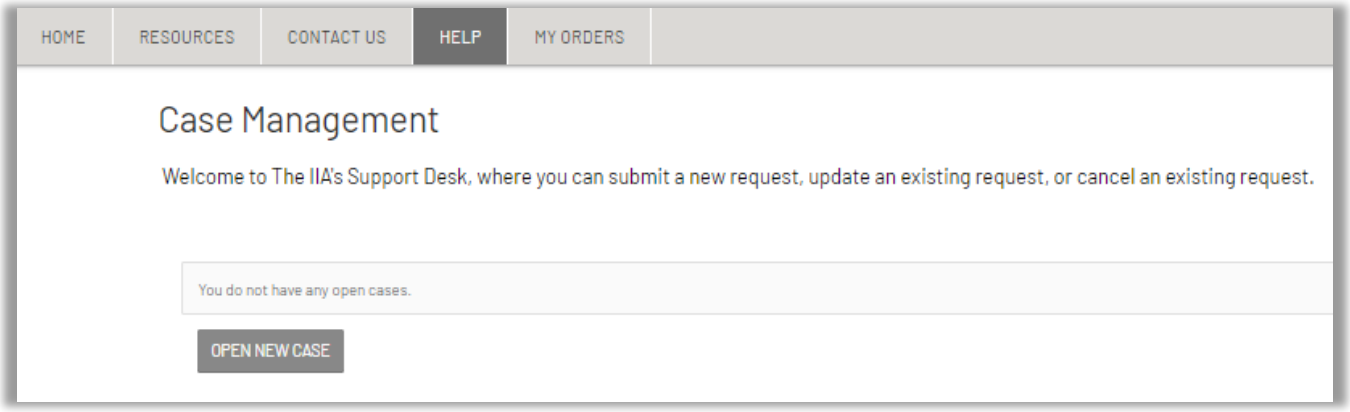
My Profile allows you to update contact information, billing address, and shipping address, apply for student program, and reset your password.

Help/Case Management

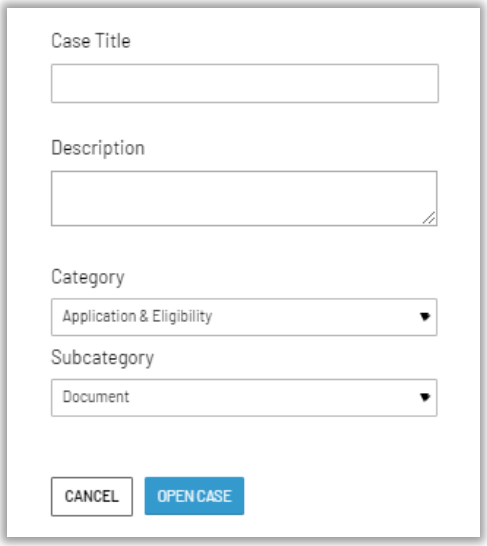
The Help function allows you to connect to The IIA's Support Helpdesk. You will be able to submit help requests, update existing requests or cancel an existing request.

To access Case Management:

- Click **Help** from top navigation/menu bar. The Case Management page will display.



To open a new case: Click **Open New Case.**



Candidate Suppression

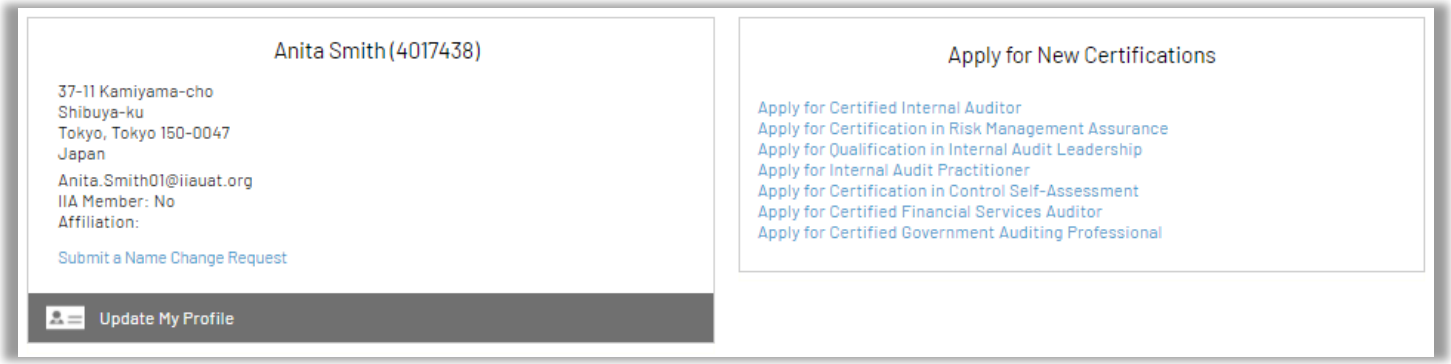
Candidates from specific countries are restricted from making purchases through CCMS:

- Czech Republic
- Indonesia
- Korea
- Japan
- Thailand

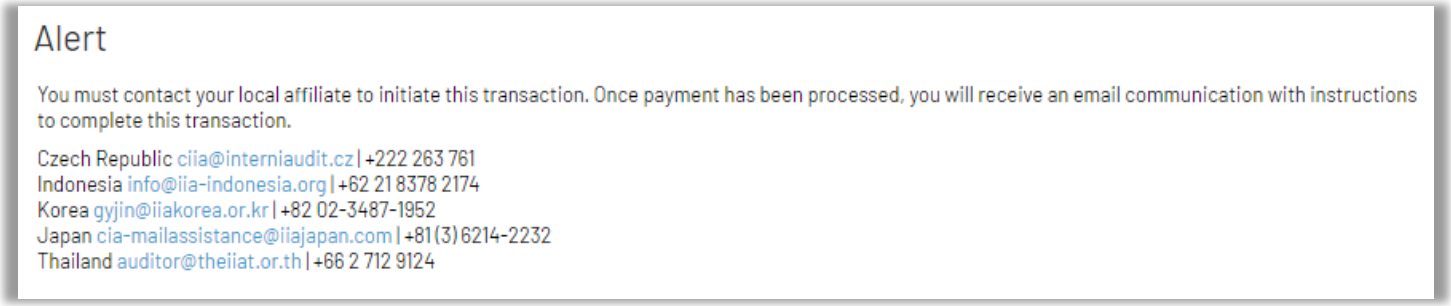
These candidates make their purchases through their local institutes who then initiate the order through a separate B2B application system. A voucher is placed on the candidates' record to proceed with this request.

Suppression Alert

On the Home page, under Apply for New Certifications, click **Apply for Certified Internal Auditor.**

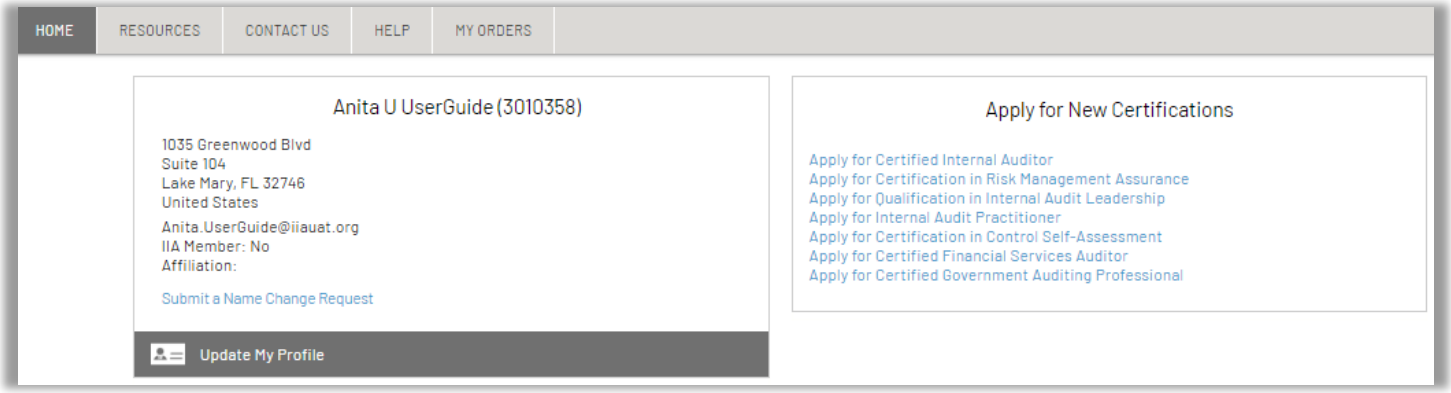


The following suppression Alert will display:



Applying for a New Certification

- On the Home page, under Apply for New Certifications, click **Apply for Certified Internal Auditor.**



- Agree to Terms and Conditions. Click **Continue**.
- Pay for Application and Checkout.

The following payment methods are available:

Credit Card

- Select **Credit Card.**
- Populate the following fields and click **Confirm Order and Purchase.**

Quote Me

Quote Me is a payment option that allows candidates to get an initial price of the Certification and a document suitable for submission to a supervisor for approval. Once candidates decide to proceed with the transaction, the quote can be converted to an order and paid for.

Wire Transfers

Wire Transfers is a payment option used to electronically transfer funds across a network of banks or transfer agencies around the world. Senders pay for the transaction at the remitting bank and provide the recipient's name, bank account number, and the amount transferred.

Ethical Standing

Ethical Standing page will display.

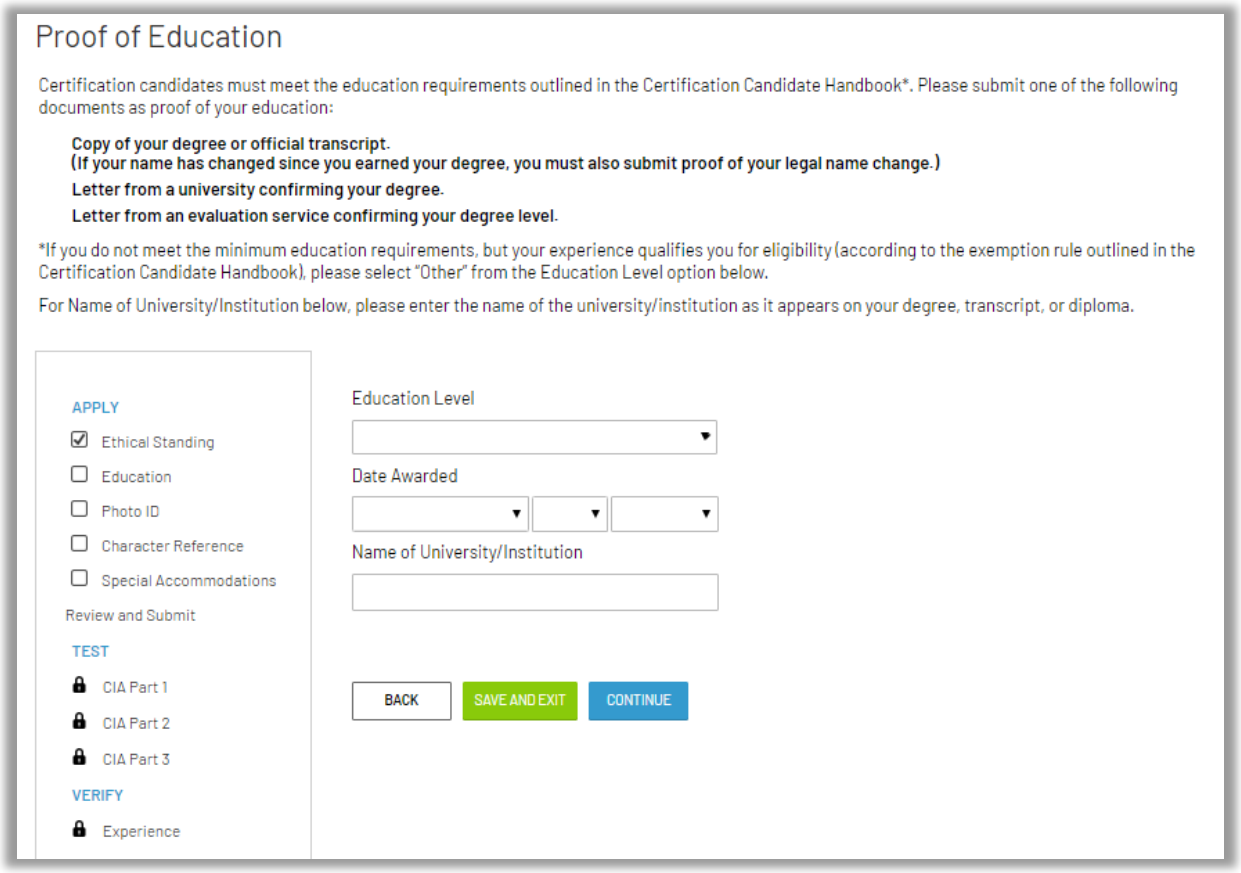
- Select **No** if you not been convicted of a federal offence, felony or indictable offense. Click **Continue.**
- Select **Yes** if you have been convicted of a federal offense, felony, or indictable offense.

Selecting **Yes** will prompt for a description of the nature of the conviction.

- Enter a description and click **Continue.**

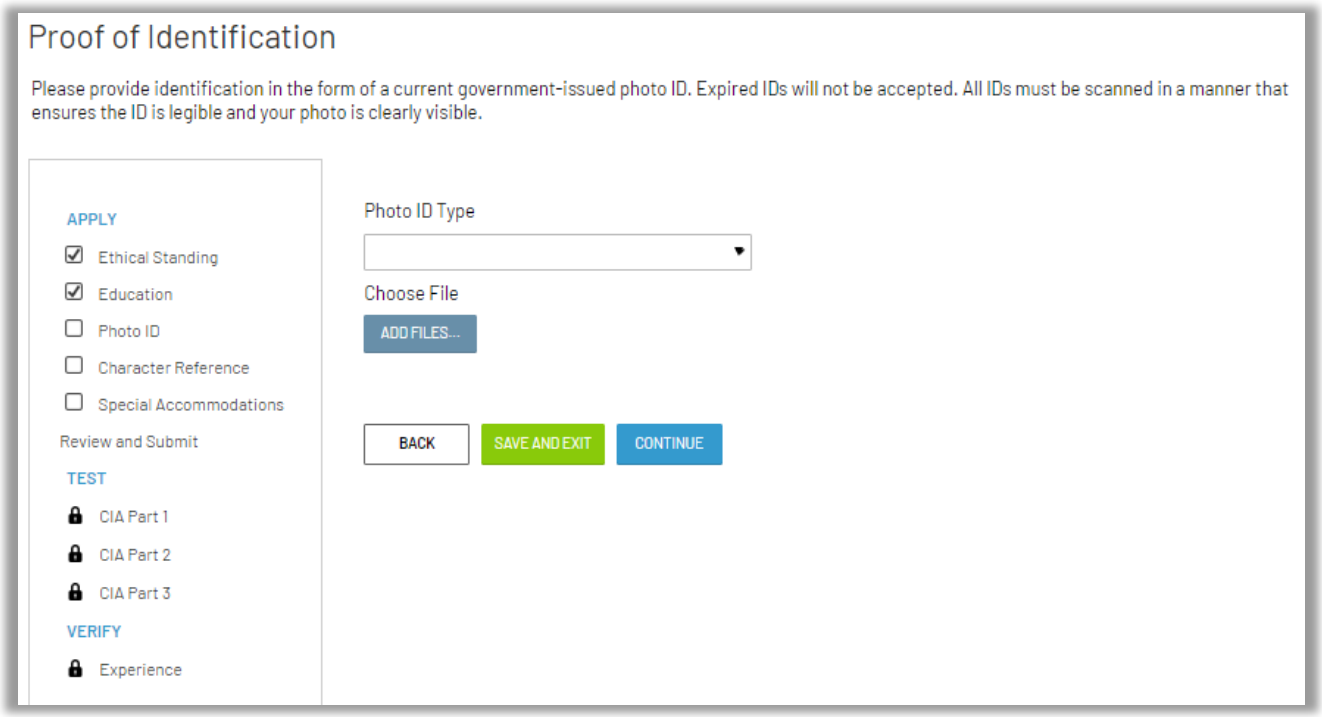
Proof of Education

Proof of Education page is displayed and is required for selected certifications. Populate the fields, upload the required documentation and click **Continue.**



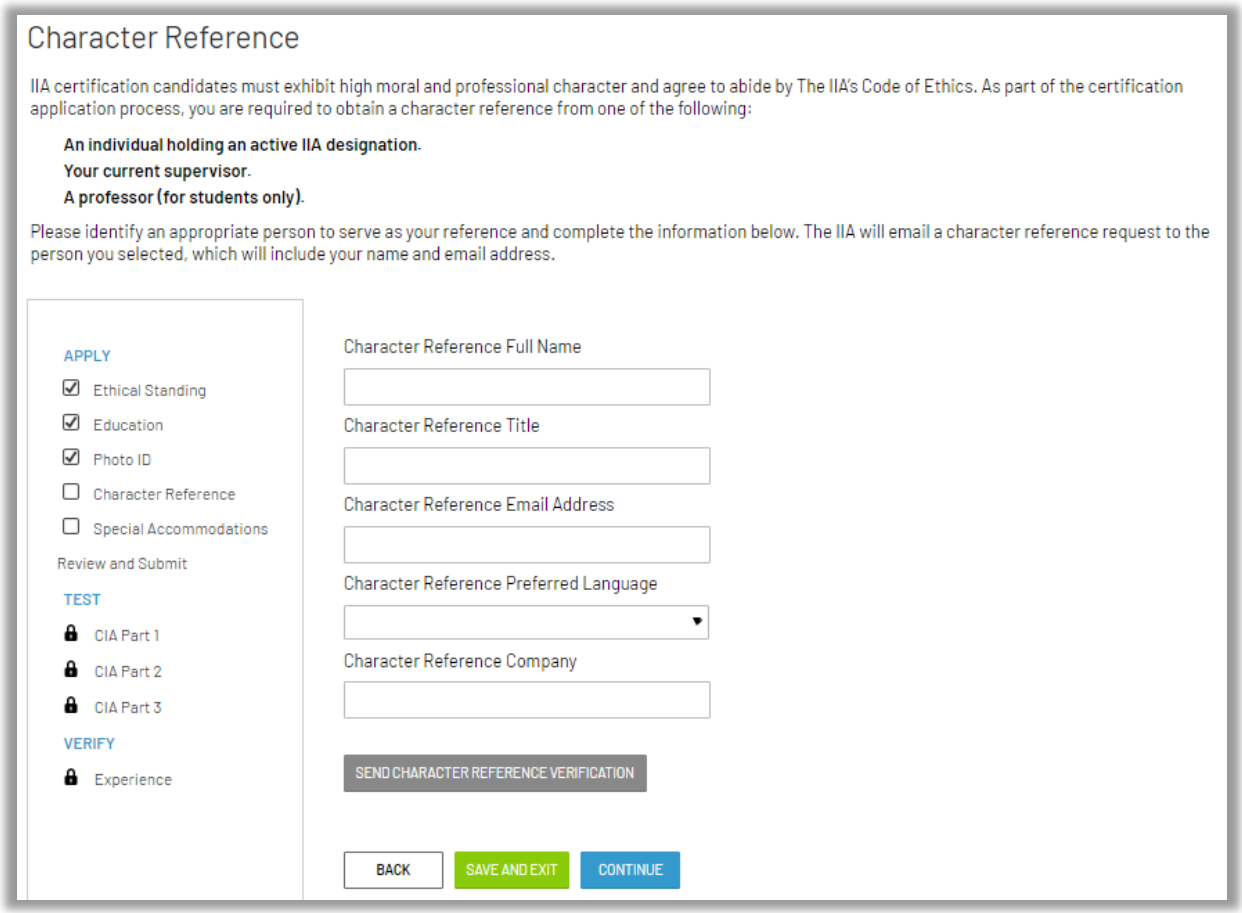
Proof of Identification

Proof of Identification page is displayed and is required for selected certifications. Populate the fields, upload the required documentation and click **Continue.**



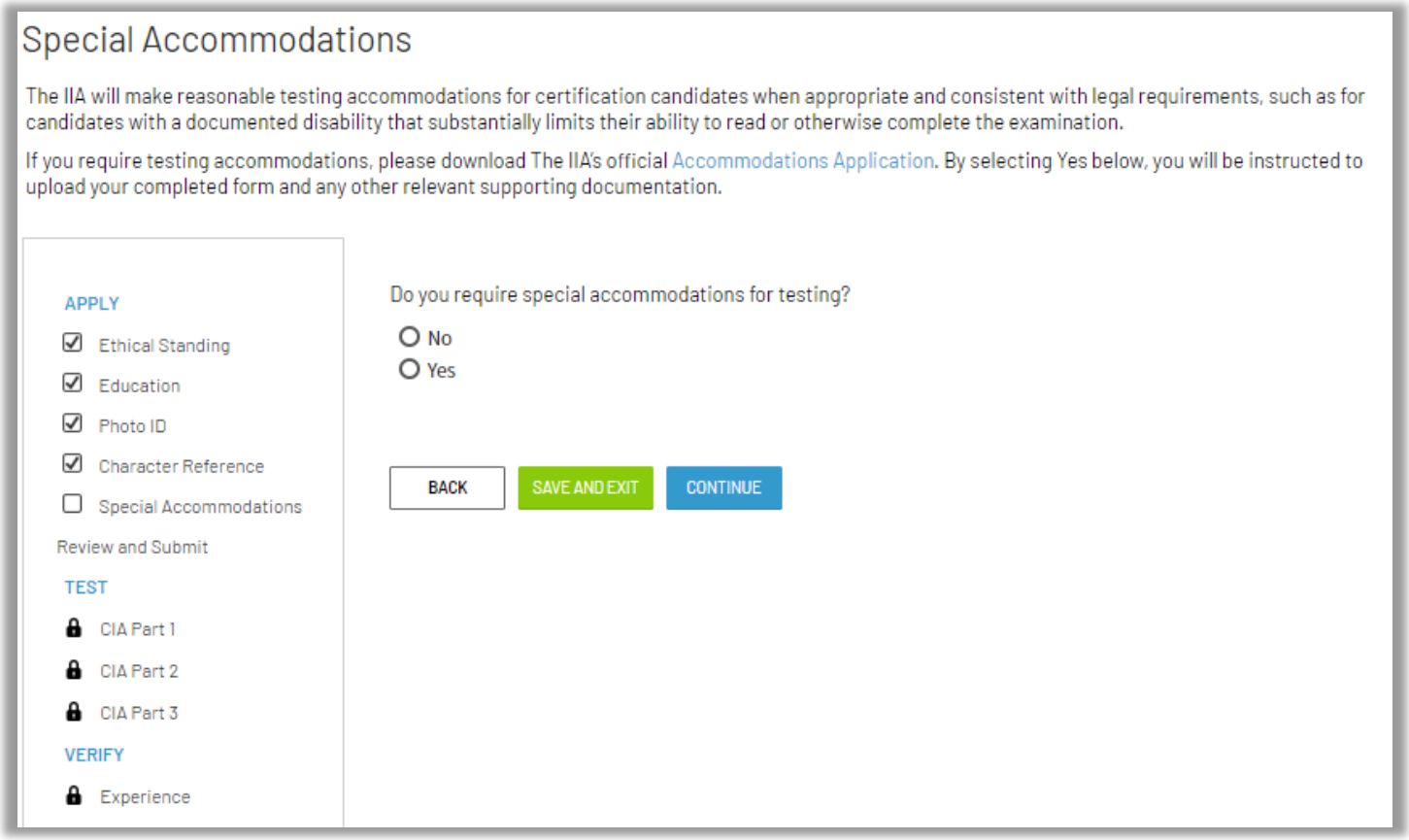
Character Reference

The Character Reference page is displayed. A character reference is required for applicable certifications. Populate the fields, click **Send Verification** and click **Continue.**



Special Accommodations

Special Accommodations page will display. The IIA offers testing accommodations if you have a documented disability that could possibly limit your ability to read or otherwise complete an exam. Upload your forms and any other supporting documentation. Click **Continue.**

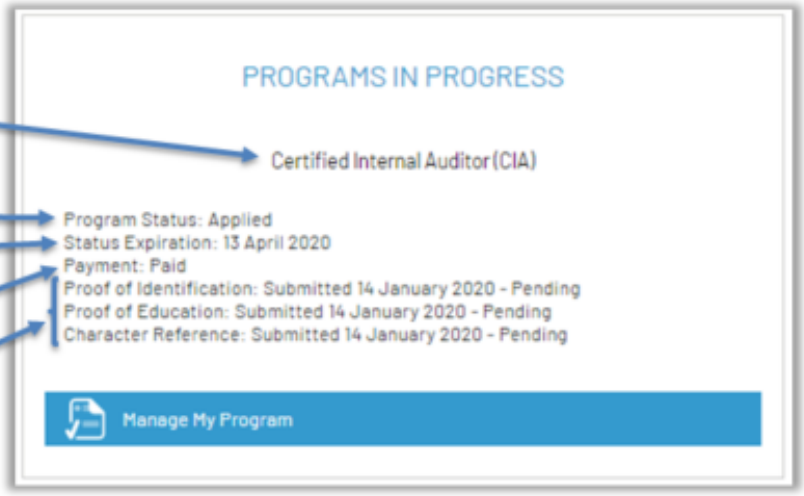


Review and Submit

The Review and Submit page is displayed with a summary of the program requirements. Click **Submit.**

You will be taken back to the CCMS Home page. Programs in Progress tile is displayed with the applicable certifications in progress.

- Programs in Progress tile is displayed with the applicable certification in progress.
- The Certification Program will have a status of *Applied*.
- Status Expiration date is populated.
- Payment status is populated.
- Proof of Identification, Education and Character Reference will have a status of *Pending* until approved.



Rejected/Approved Documents and Notifications

In order to move on the next step of registering and scheduling exams, Proof of Identification, Proof of Education and Character Reference must be approved (as well as Felony and Special Accommodations – *if applicable*). Once the email notifications are received, log into CCMS. Programs in Progress tile is displayed with new updates:

- Program status is Approved.
- Proof of Experience has been added to tile.
- Exams are added to tile and candidate is now eligible to register and schedule the exams.
- *Extend My Program* link is now available.

CCMS - Certification Candidate Management System Quick Start Guide

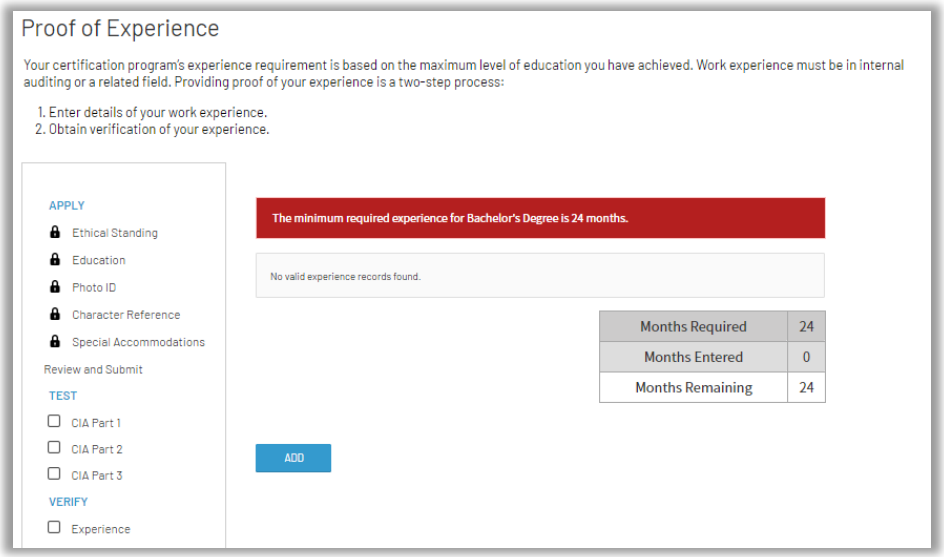
Proof of Experience

Proof of Experience is based on the certification program's maximum level of education that you have received. It is a two-step process that includes:

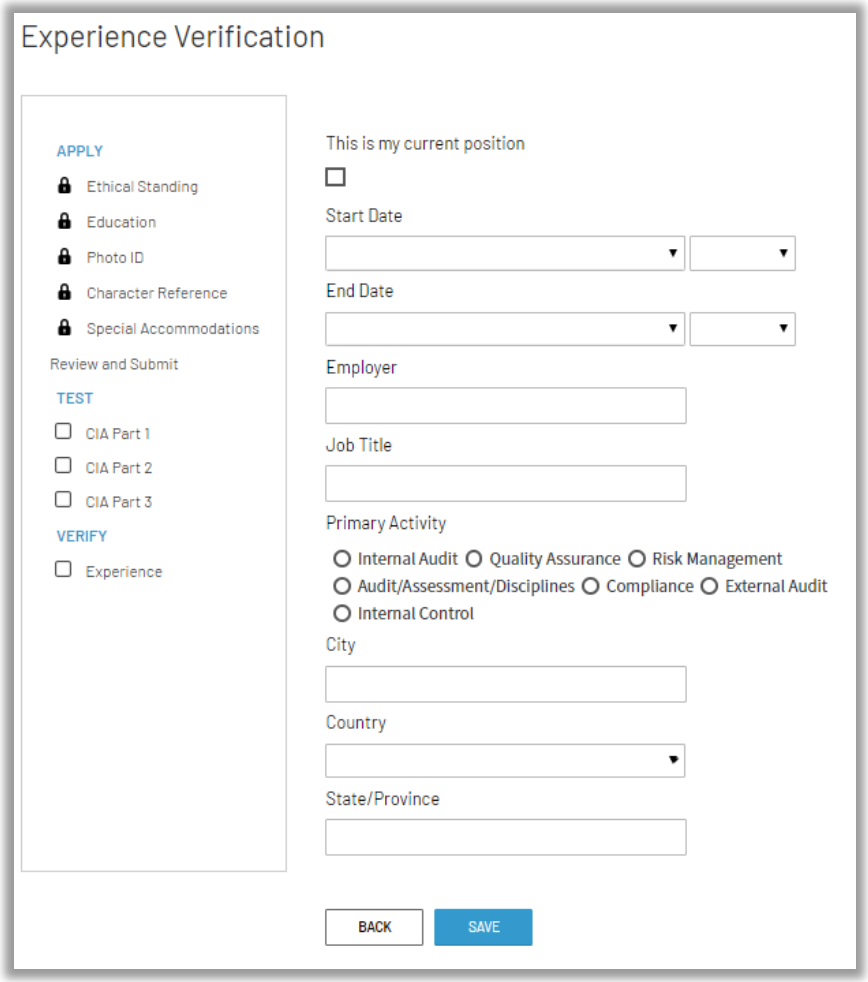
- Entering the details of your work experience.
- Obtaining verification of your work experience.

Enter Work Experience

- On the CCMS home page, click **Manage My Program.**
- Under Verify on left navigation, click **Experience.**
- Proof of Experience is available.

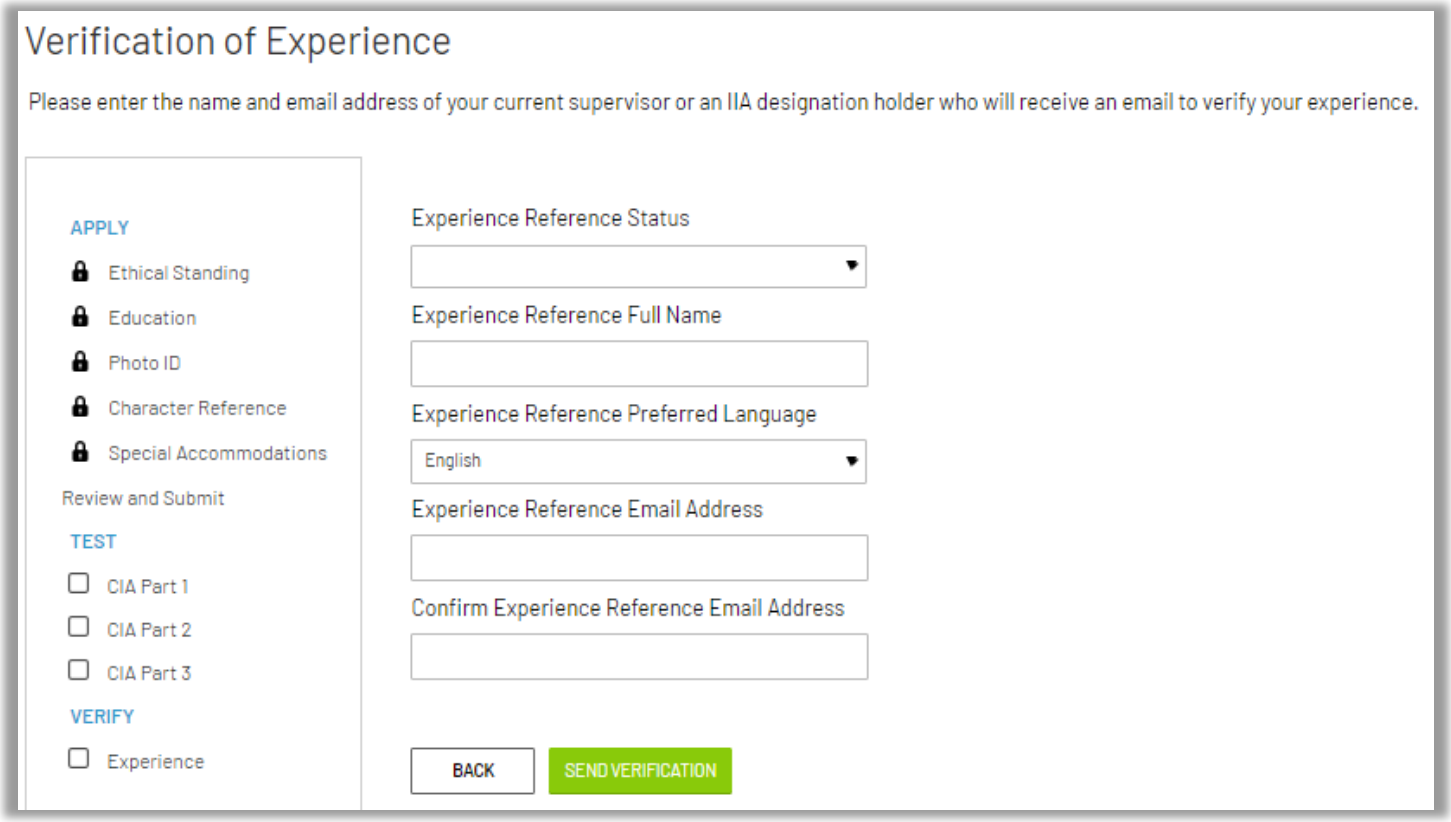


Click **Add.** Experience Verification page will display. Populate the fields and click **Save.**



Verification of Experience

- Enter the name and email address of your current supervisor or an IIA designation holder who will receive an email to verify your experience. Click **Send Verification.** If your Experience Reference is approved, you will receive an email notification and no further action is needed.

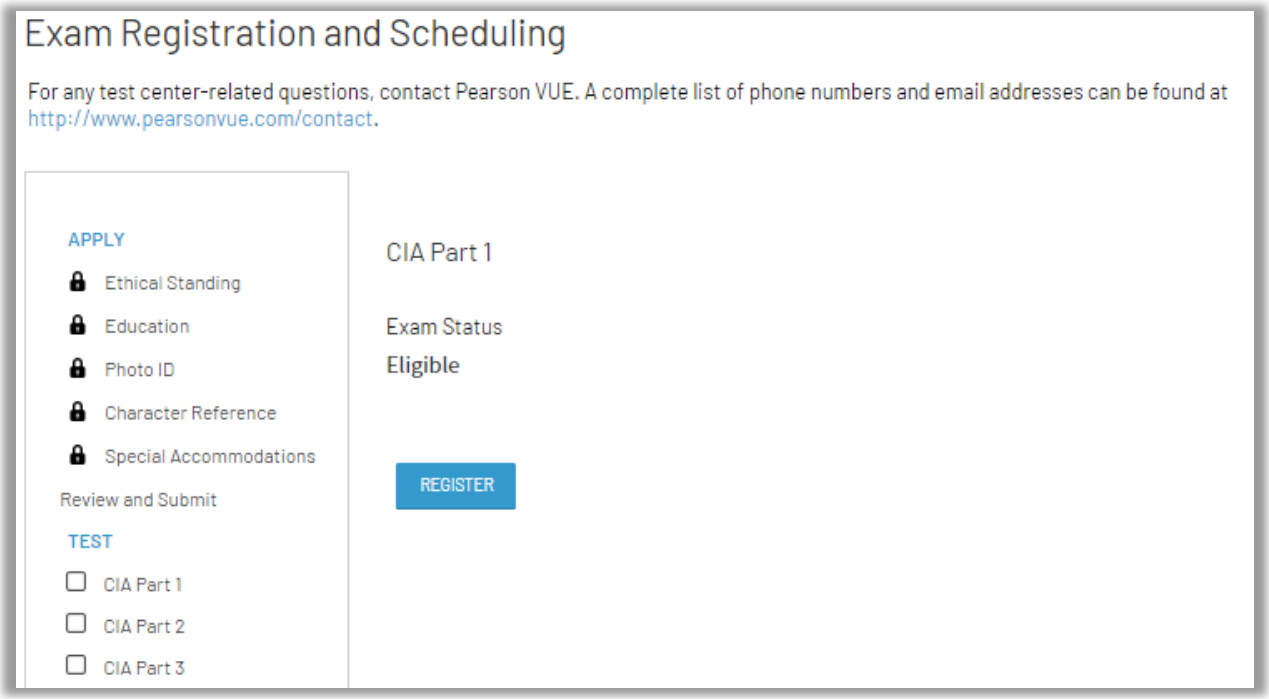


Exam Registration and Scheduling

Registration

On the CCMS home page, click **Manage My Program** to register and schedule exams.

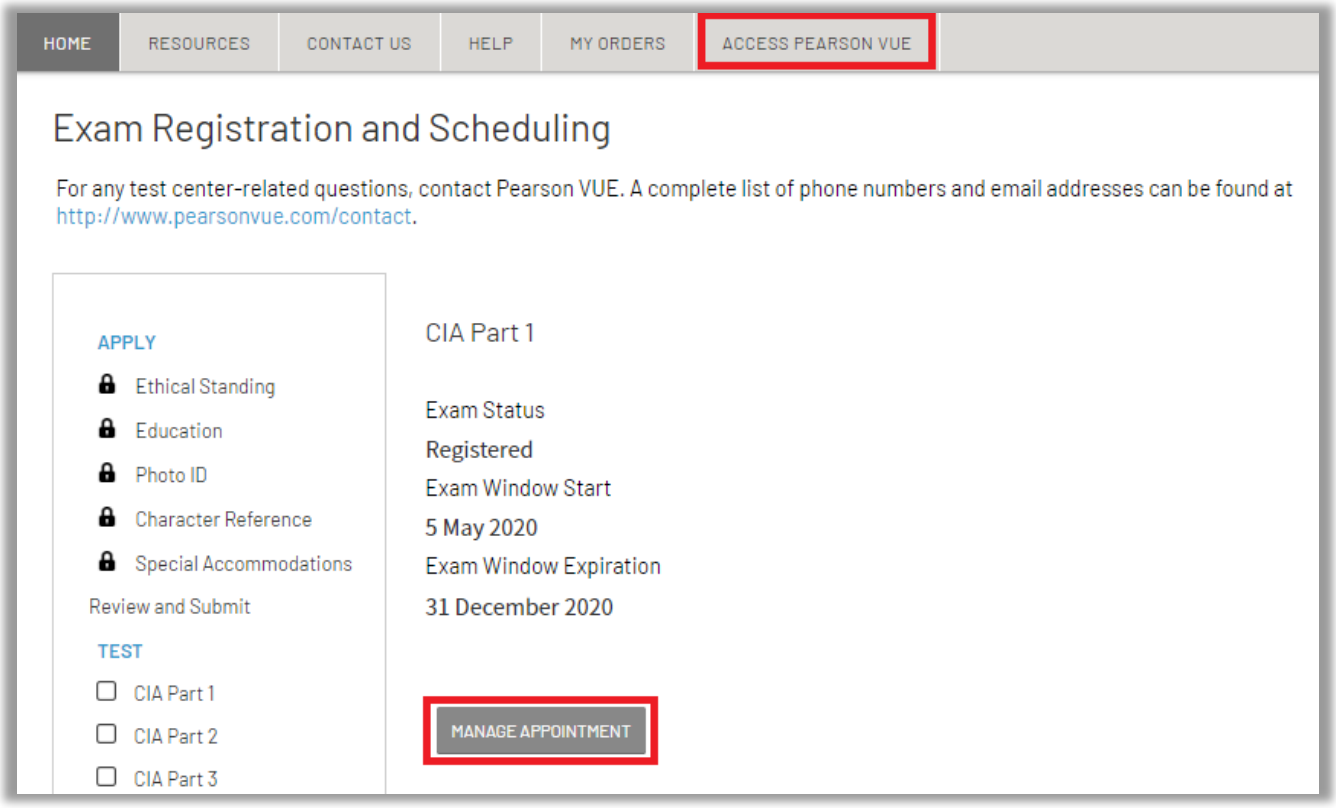
- Click **CIA Part 1.** Exam Registration and Scheduling for CIA Part 1 will display with a status of Eligible.



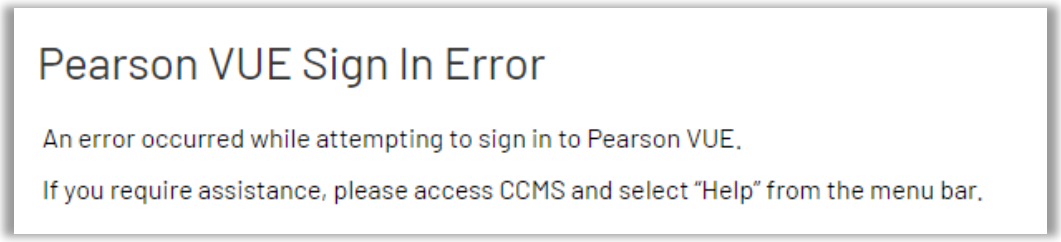
- Click **Register.** Non-Disclosure Agreement and General Terms of User page will display. Click Accept and **Continue.**
- The Cart Checkout page will display with the Program Registration fee. Pay and **Continue.**

Schedule an Exam

To complete the scheduling process once registered and authorized, select **Manage Appointment** or **Access Pearson VUE** to schedule an exam:

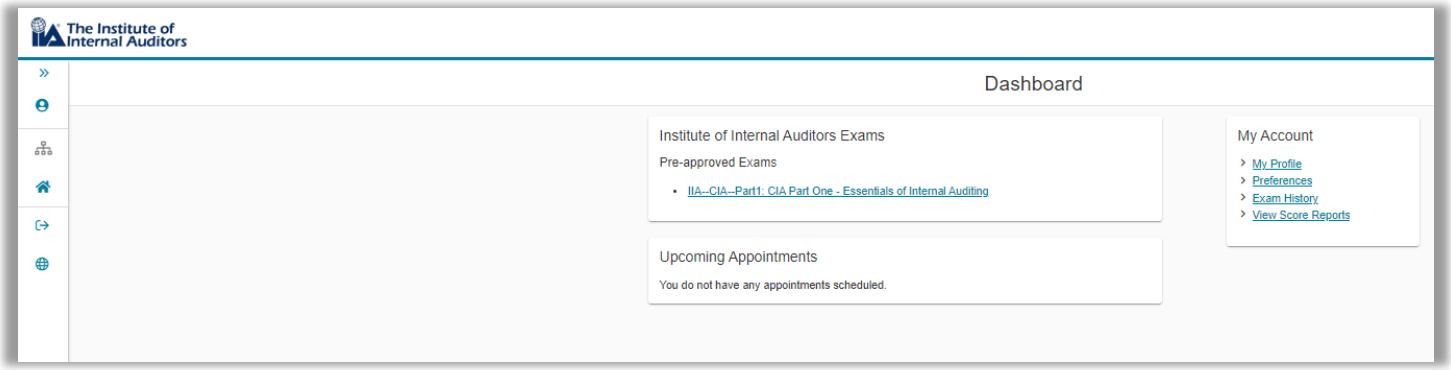


NOTE: If there is an error signing into Pearson VUE, the following message will occur:

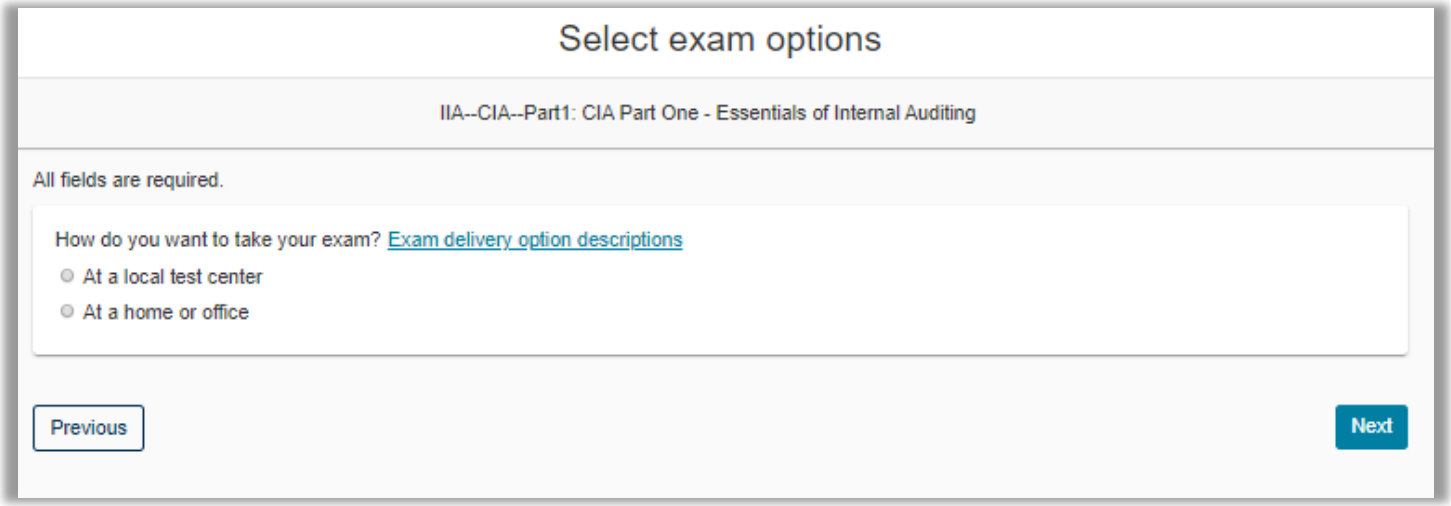


CCMS will pass the candidate via Single Sign-on (SSO) to the Pearson VUE site where the candidate will complete the scheduling process. Pearson VUE Dashboard is displayed.

Click on the Pre-approved Exam link:



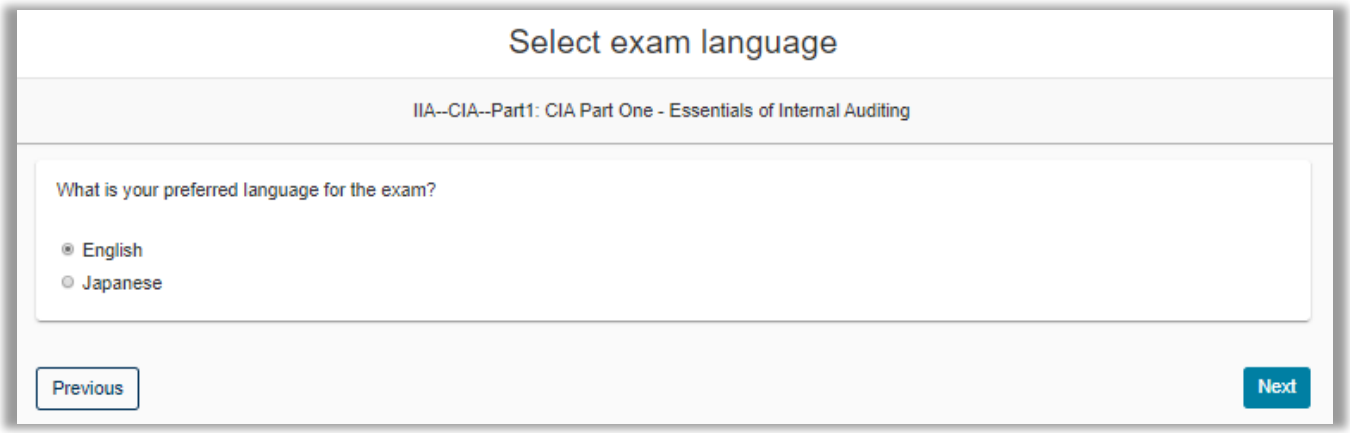
Select Exam Options page appears.



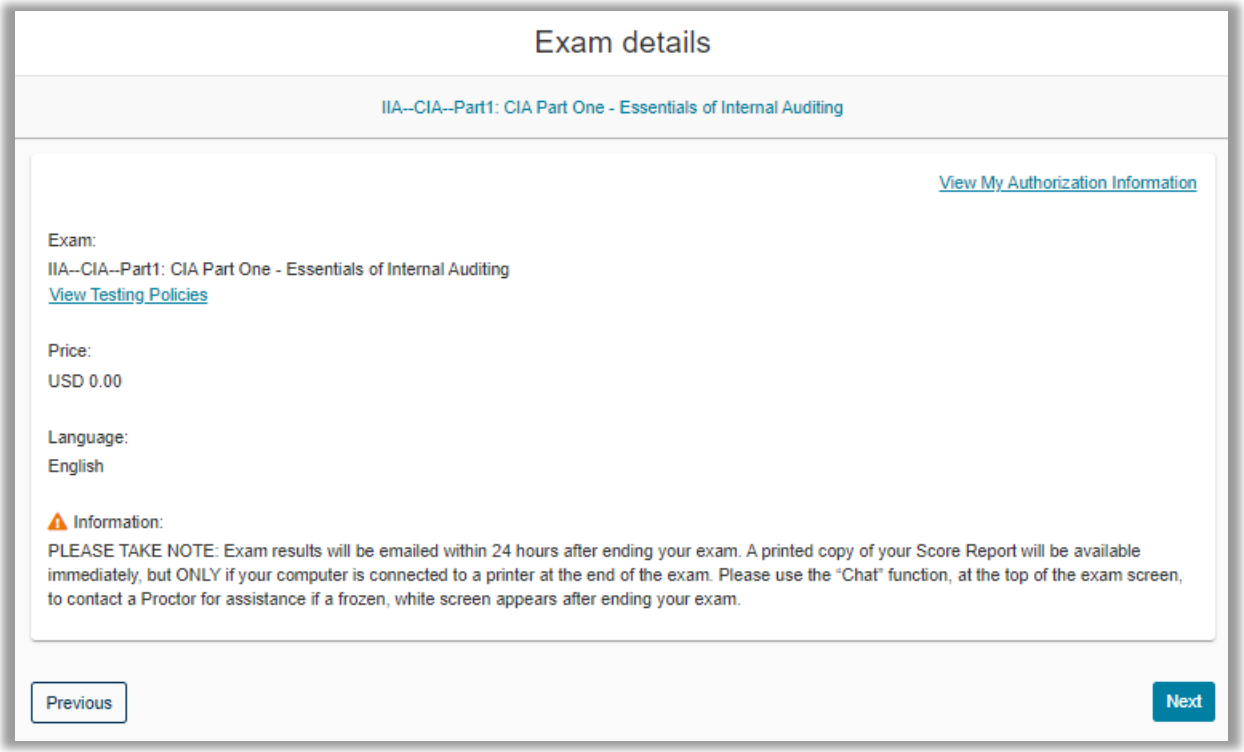
Local Test Center

- Select **At a local test Center**. Click **Next.**

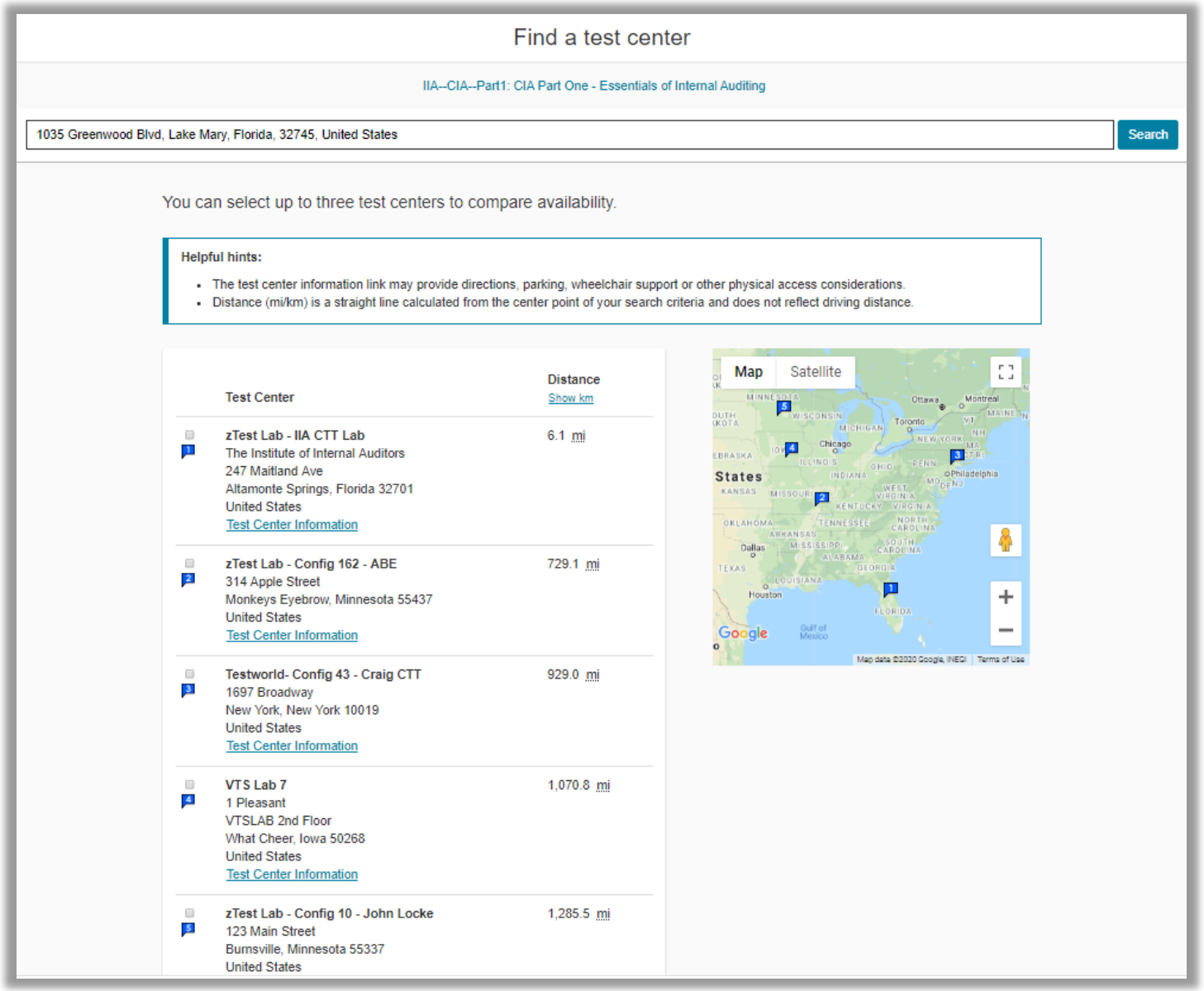
Select Exam Language page appears. Select a language. Click **Next.**



Exam Details page will display. Click **Next.**

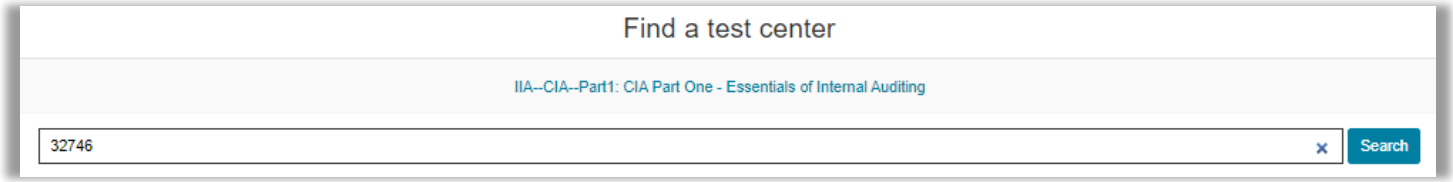


Find a Test Center page will display.



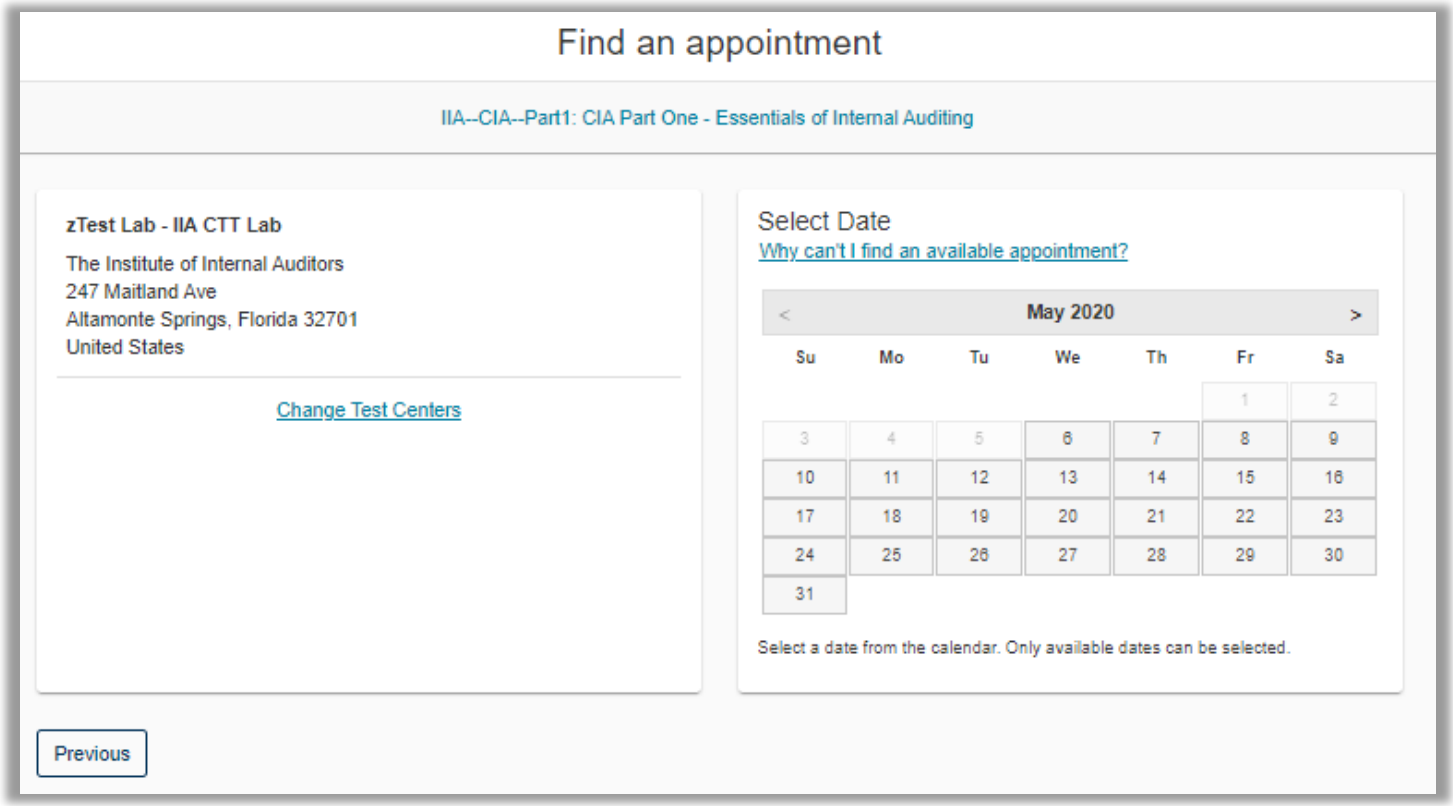
Candidate can search for test centers using the following search phrases such as the examples below and then clicking **Search.**

- E.g. “55437” or “5601 Green Valley Drive, Bloomington, MN” or “Paris, France”



- Click a checkbox to select a Test Center. A candidate can select up to three test centers to view availability.
- Click **Next.**

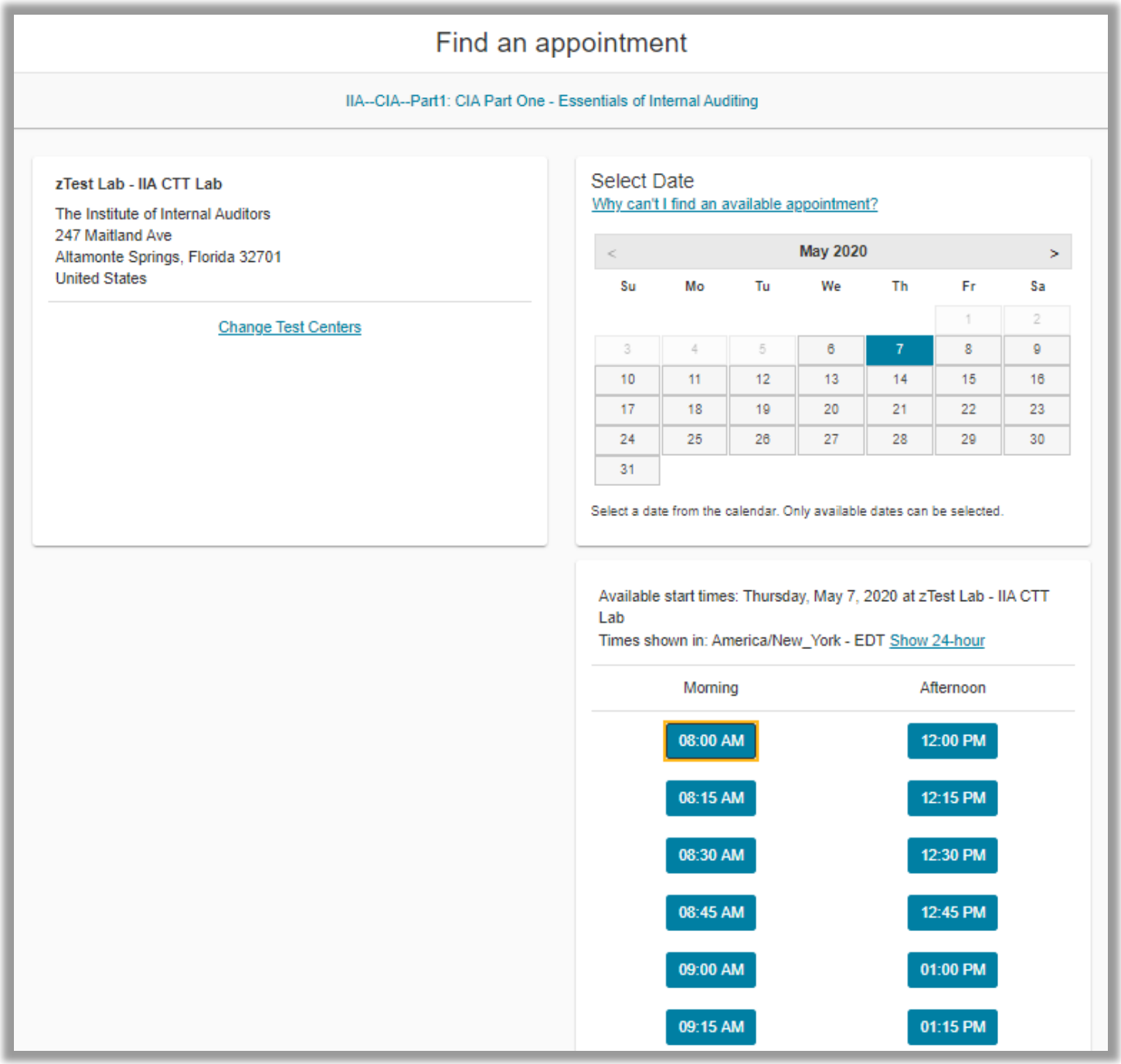
Choose Appointment page will display:



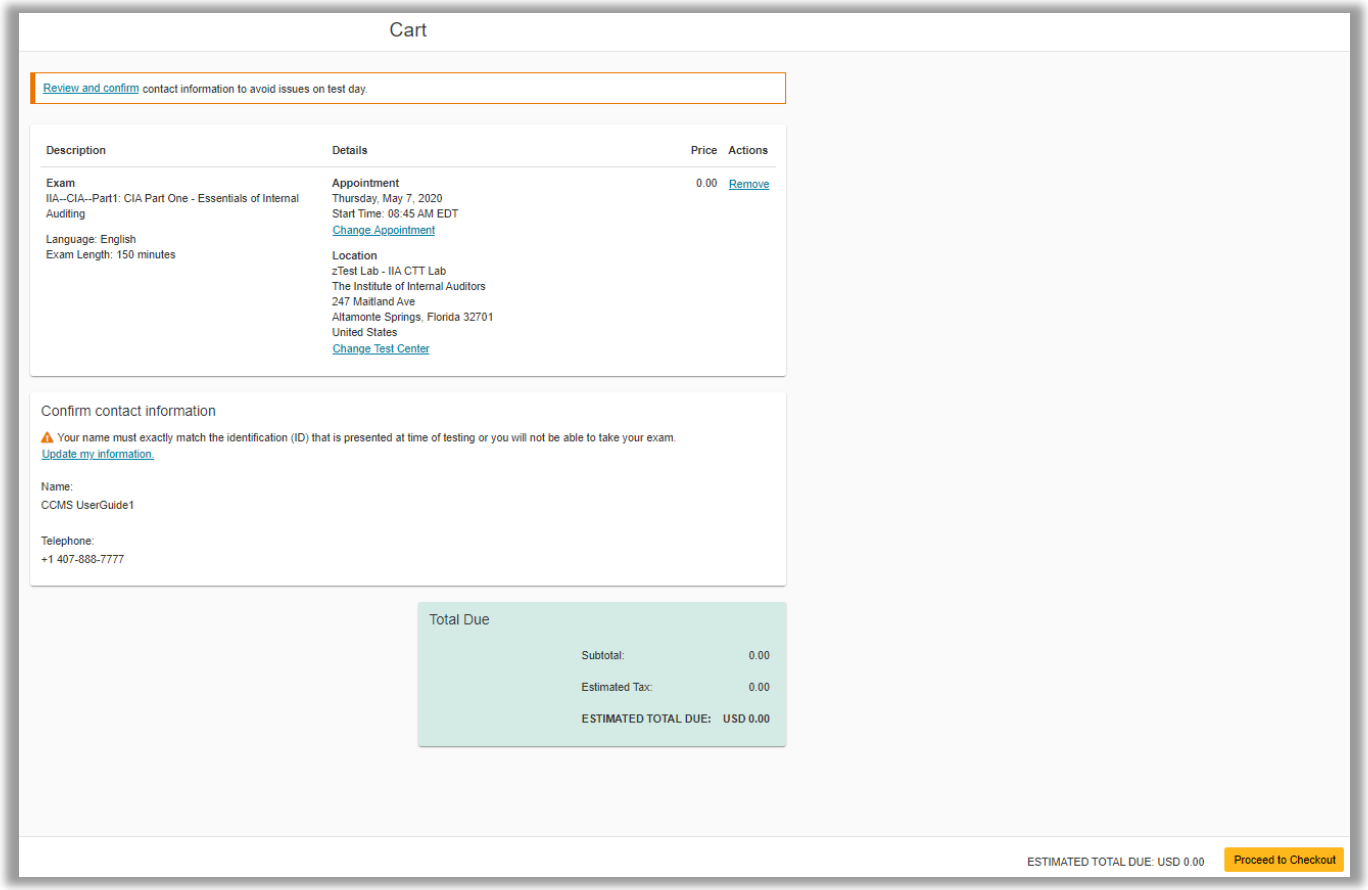
- Select a Date from the Calendar. Available start times for exams will display.
- Select a Time.

CCMS - Certification Candidate Management System Quick Start Guide

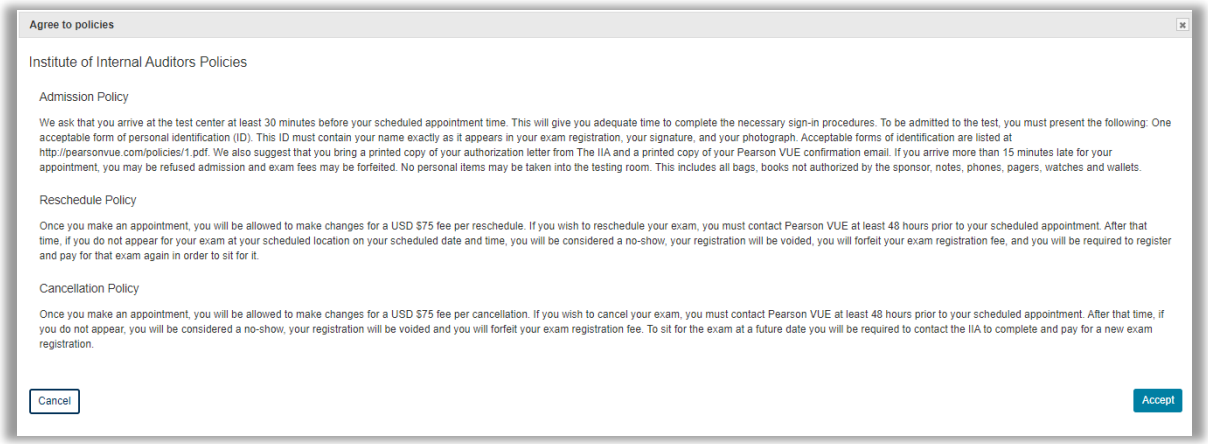
The Institute of Internal Auditors | Global



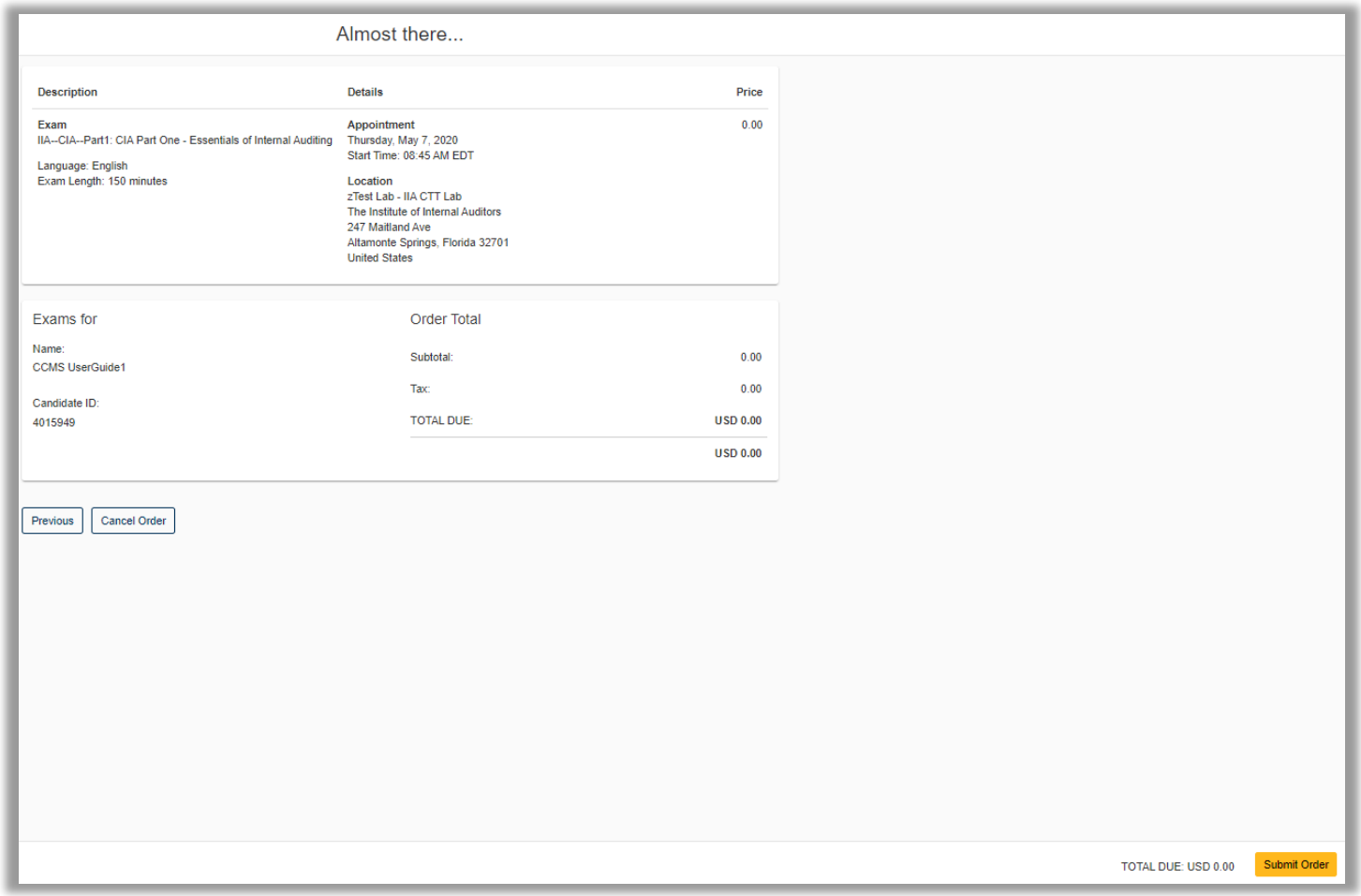
Cart will display.



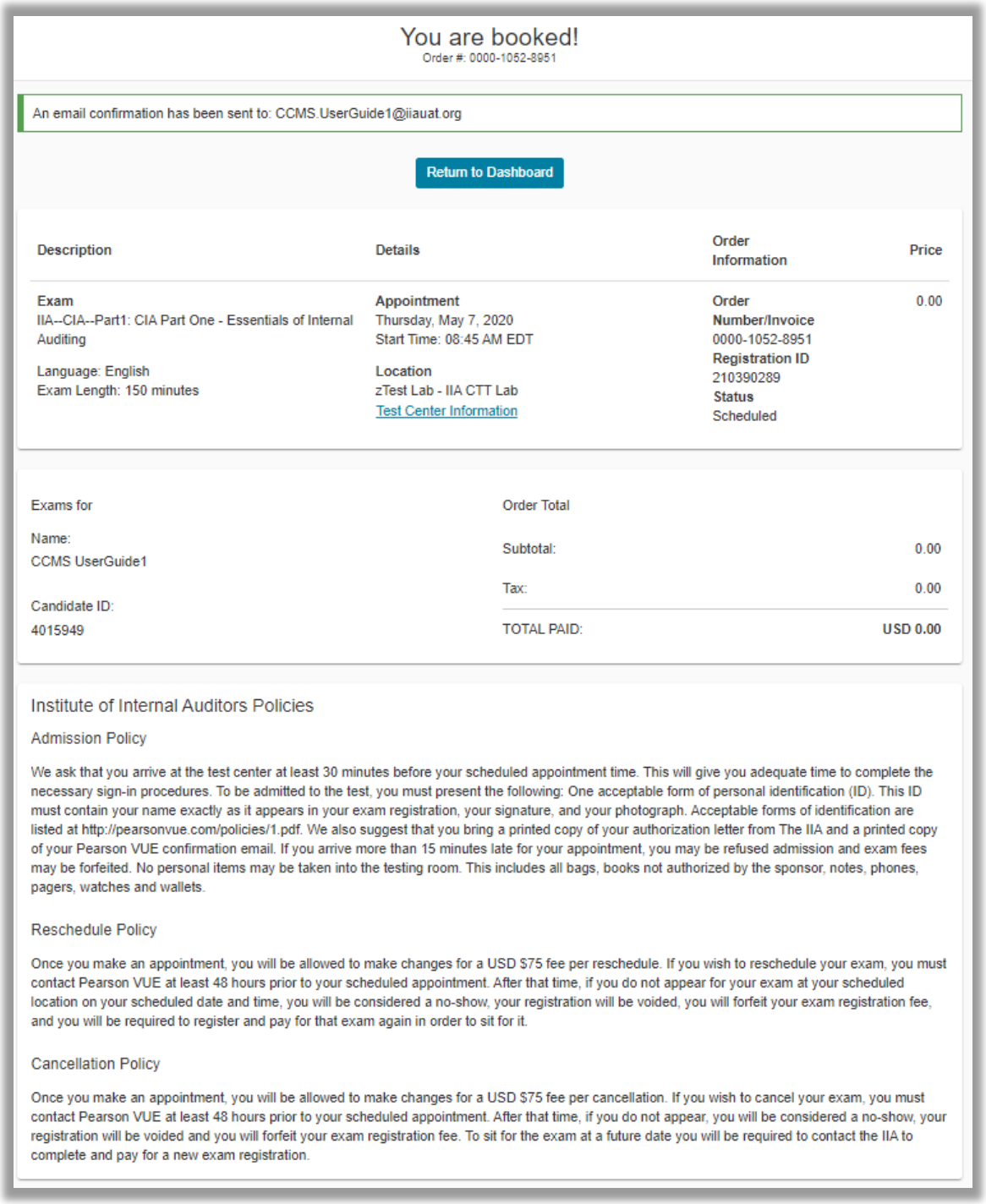
- Click **Proceed to checkout.** Agree to Policies pop up will display:



Click **Accept**. *Order Details* will display:



Click **Submit Order.** Confirmation page will appear.



You are booked!

Order #: 0000-1052-8951

An email confirmation has been sent to: CCMS.UserGuide1@iiauat.org

Return to Dashboard

Description	Details	Order Information	Price
Exam IIA--CIA--Part1: CIA Part One - Essentials of Internal Auditing Language: English Exam Length: 150 minutes	**Appointment** Thursday, May 7, 2020 Start Time: 08:45 AM EDT **Location** zTest Lab - IIA CTT Lab Test Center Information	**Order Number/Invoice** 0000-1052-8951 **Registration ID** 210390289 **Status** Scheduled	0.00

Exams for

Name:
CCMS UserGuide1

Candidate ID:
4015949

Order Total

Subtotal:	0.00
Tax:	0.00
TOTAL PAID:	**USD 0.00**

Institute of Internal Auditors Policies

Admission Policy

We ask that you arrive at the test center at least 30 minutes before your scheduled appointment time. This will give you adequate time to complete the necessary sign-in procedures. To be admitted to the test, you must present the following: One acceptable form of personal identification (ID). This ID must contain your name exactly as it appears in your exam registration, your signature, and your photograph. Acceptable forms of identification are listed at http://pearsonvue.com/policies/1.pdf. We also suggest that you bring a printed copy of your authorization letter from The IIA and a printed copy of your Pearson VUE confirmation email. If you arrive more than 15 minutes late for your appointment, you may be refused admission and exam fees may be forfeited. No personal items may be taken into the testing room. This includes all bags, books not authorized by the sponsor, notes, phones, pagers, watches and wallets.

Reschedule Policy

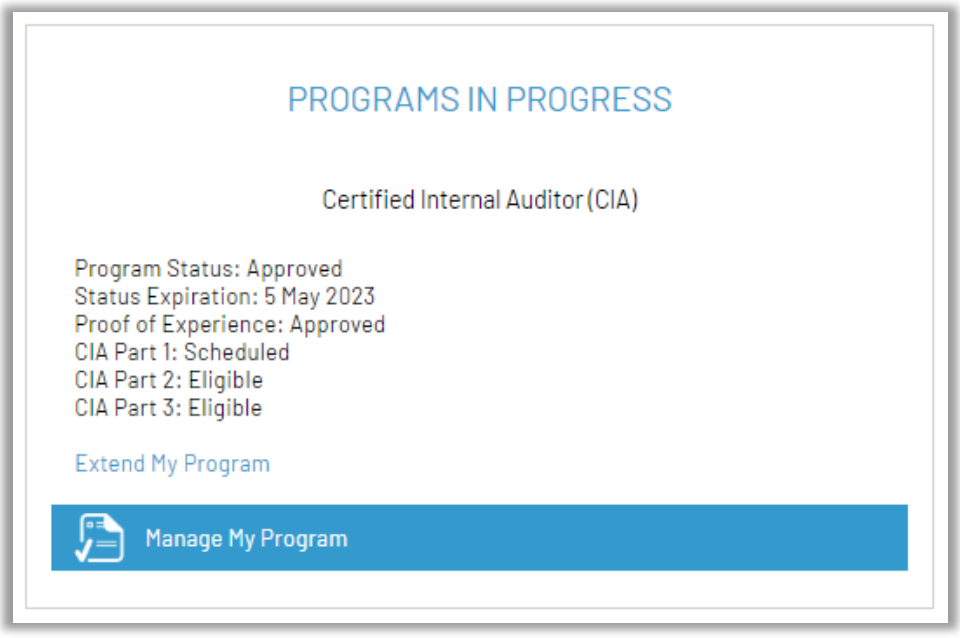
Once you make an appointment, you will be allowed to make changes for a USD $75 fee per reschedule. If you wish to reschedule your exam, you must contact Pearson VUE at least 48 hours prior to your scheduled appointment. After that time, if you do not appear for your exam at your scheduled location on your scheduled date and time, you will be considered a no-show, your registration will be voided, you will forfeit your exam registration fee, and you will be required to register and pay for that exam again in order to sit for it.

Cancellation Policy

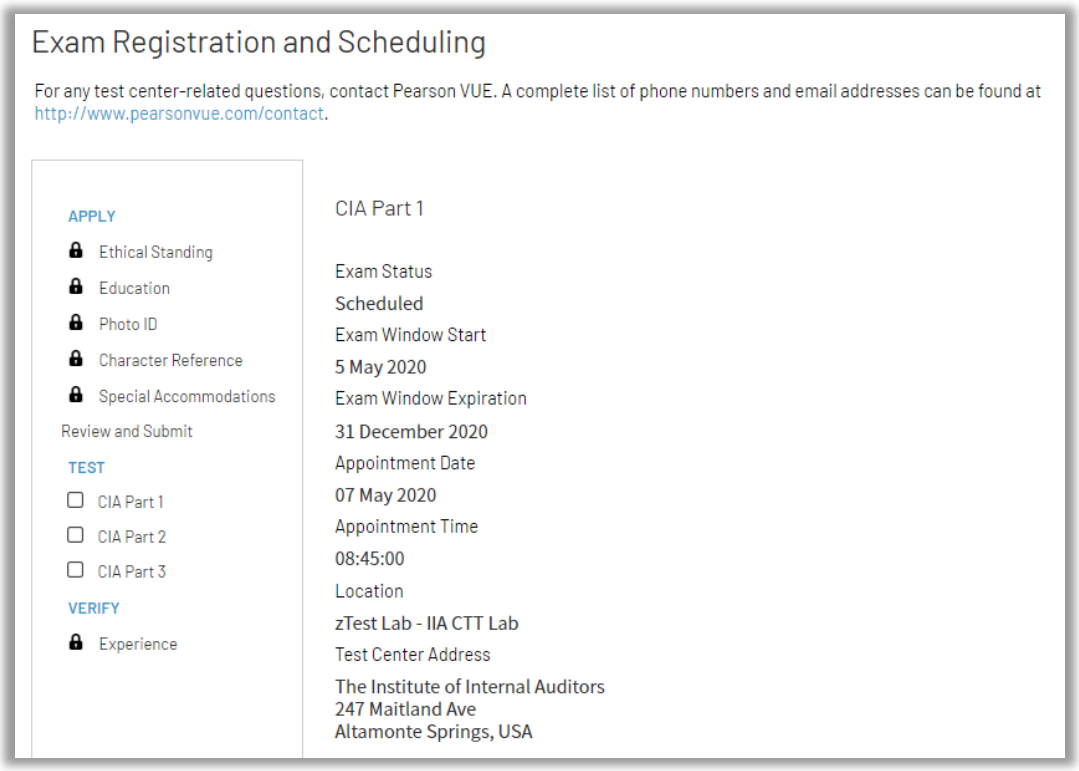
Once you make an appointment, you will be allowed to make changes for a USD $75 fee per cancellation. If you wish to cancel your exam, you must contact Pearson VUE at least 48 hours prior to your scheduled appointment. After that time, if you do not appear, you will be considered a no-show, your registration will be voided and you will forfeit your exam registration fee. To sit for the exam at a future date you will be required to contact the IIA to complete and pay for a new exam registration.

- The scheduling process is complete. The candidate can sign-out, **Return to Dashboard** or click **Return to Testing Program website** at the top left by clicking on the **Home** icon.

CCMS Home Page is displayed. Exam will have a status of *Scheduled*:



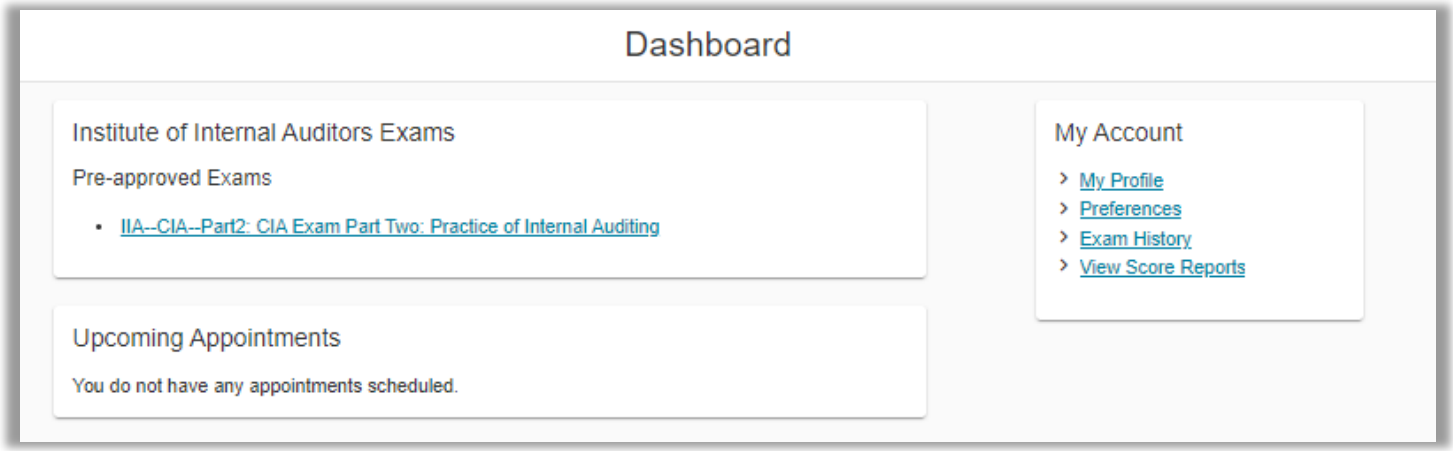
- Click **Manage My Program.**
- Click on the scheduled exam. Appointment Date, Time, and Location is displayed on Exam Registration and Scheduling page.



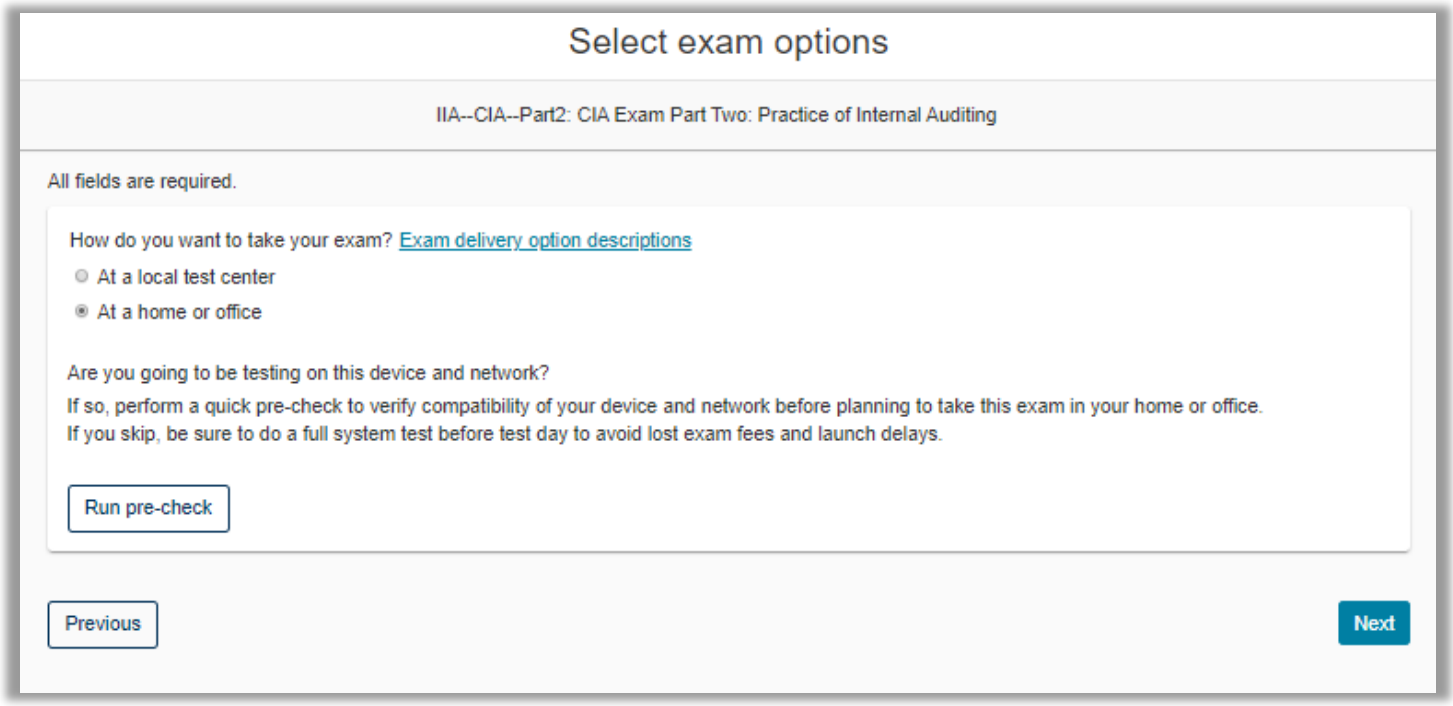
Depending on the program, the candidate will repeat the steps above (Registration and Scheduling) until all exams for the program have been successfully completed.

Scheduling Test at a Home or Office

Click on the Pre-approved Exam link after registering:

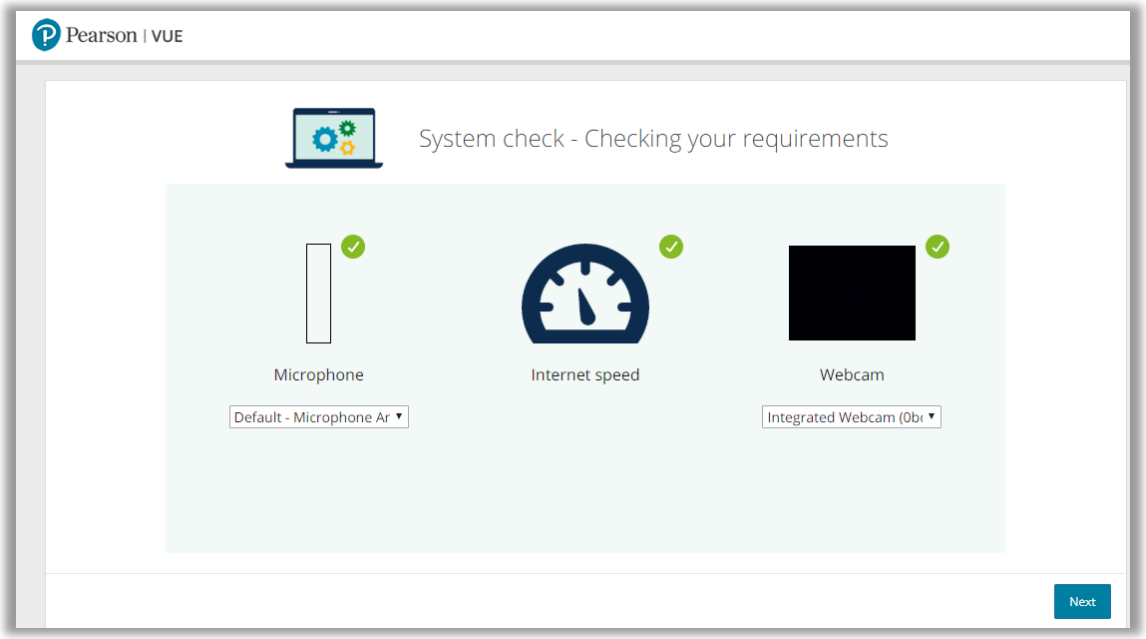


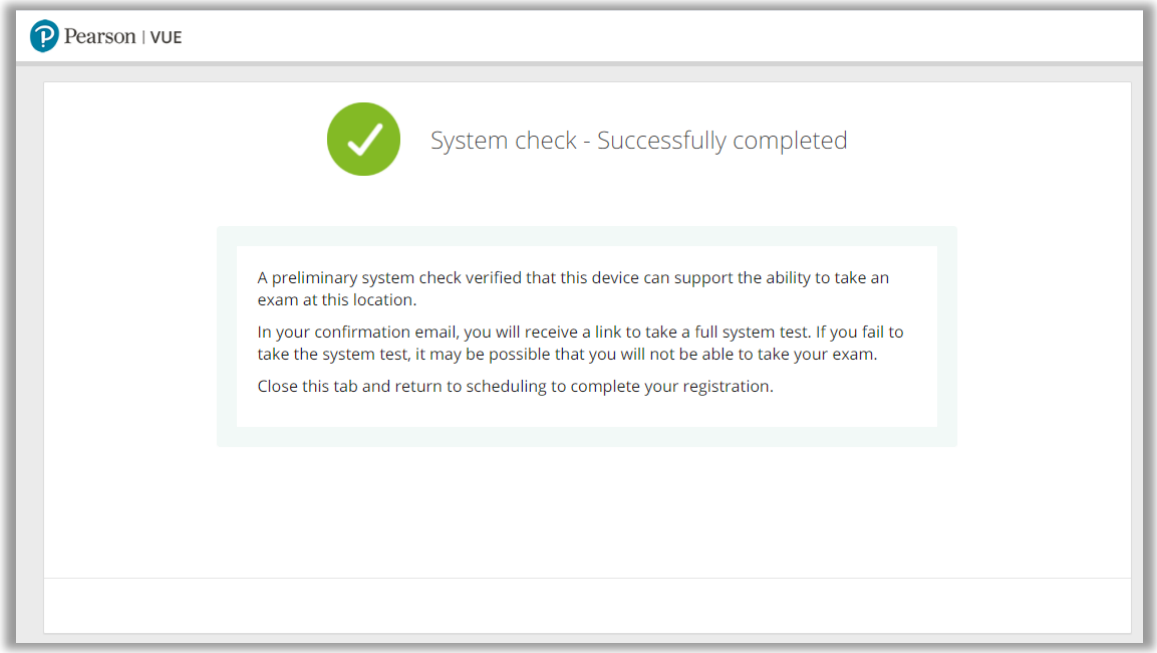
Select Exam Options page appears. Choose **At a home or office,** **Run Pre-check** and click **Next**.



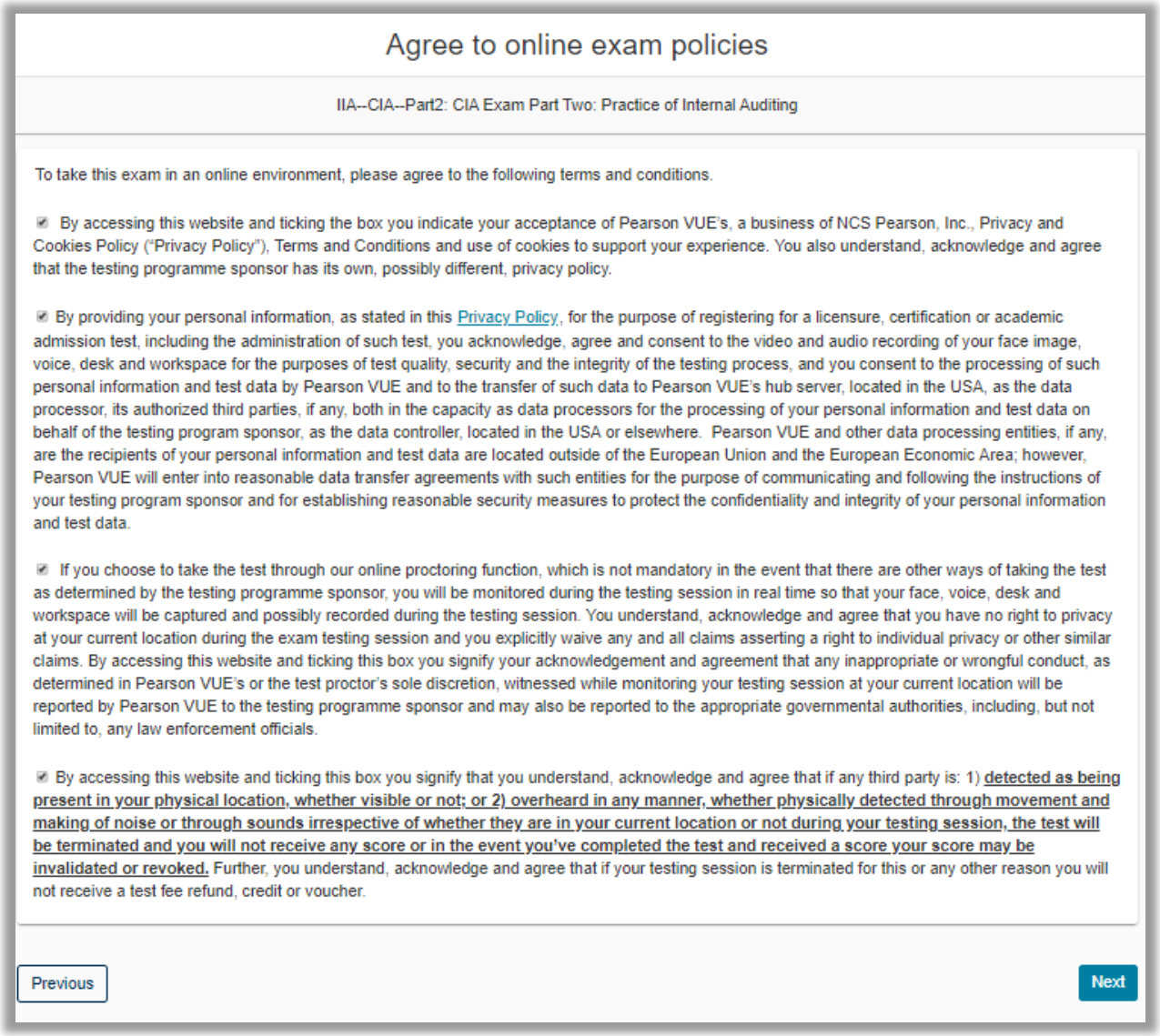
Run Precheck

Running a Pre-check will open a new browser session. The system will check your requirements and make sure that your microphone, internet speed and webcam is approved. Click **Next** and close browser session.

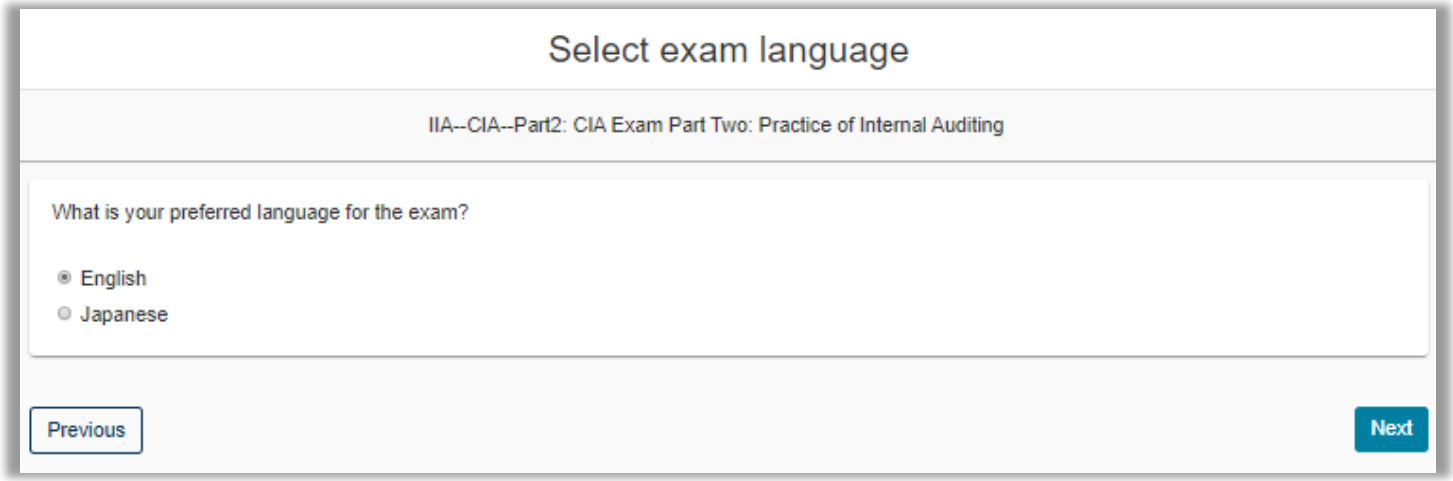




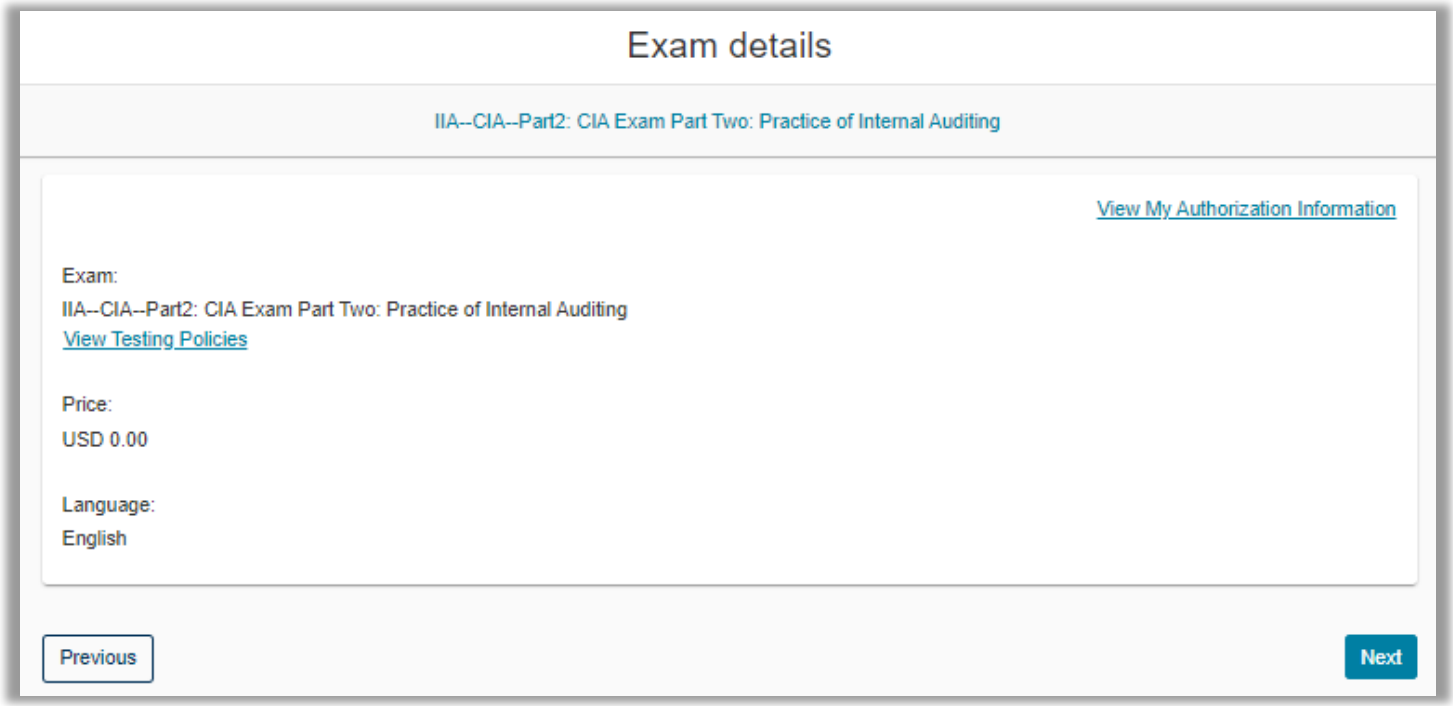
Agree to online exam policies by clicking on each checkbox of the terms and condition. Click **Next.**



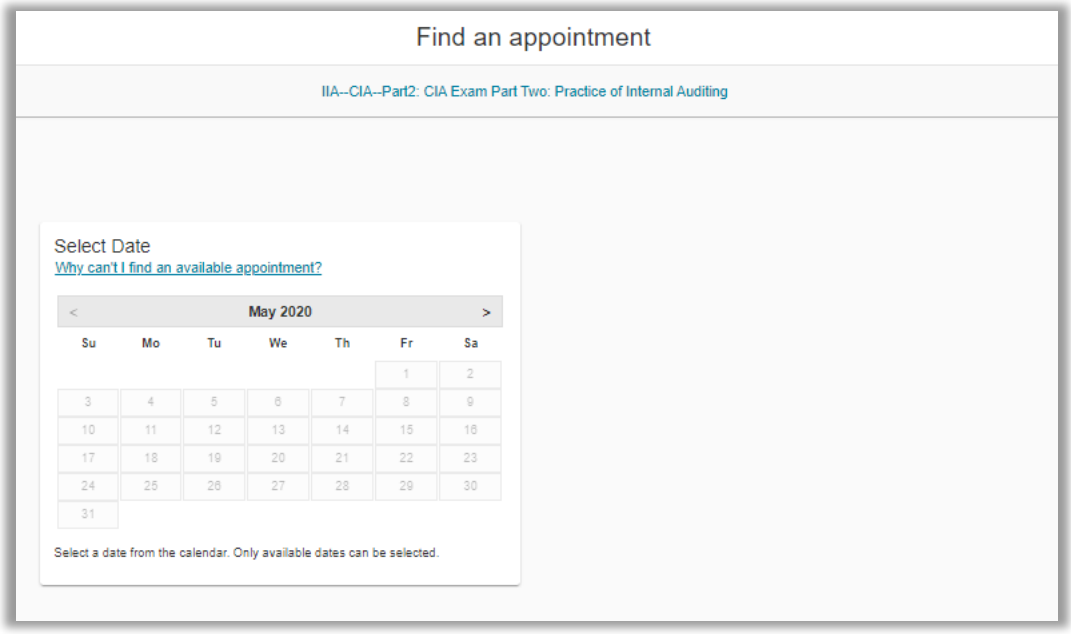
Select an exam language. Click **Next.**



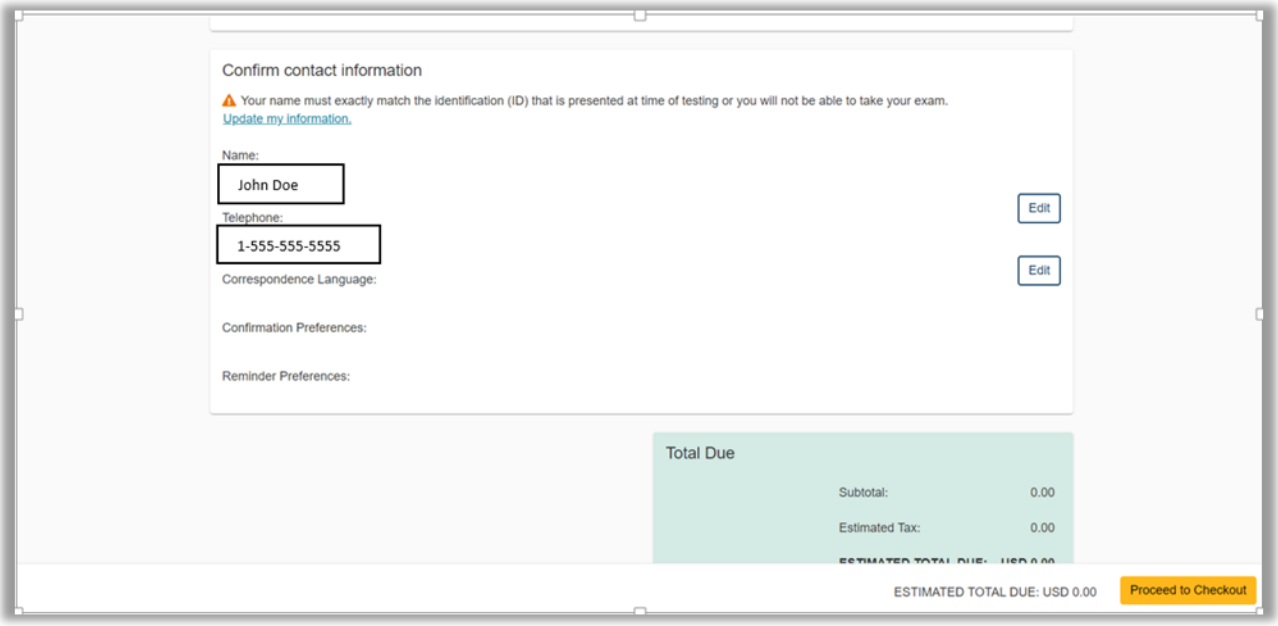
Exam Details page will display. Click **Next.**



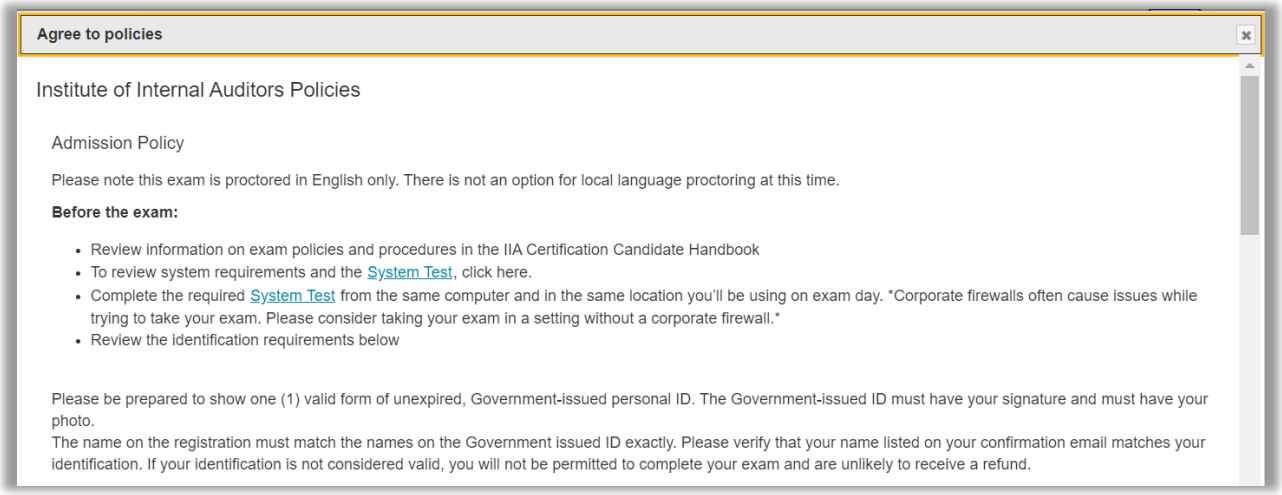
Find an appointment page will display. Select a Date and Time.



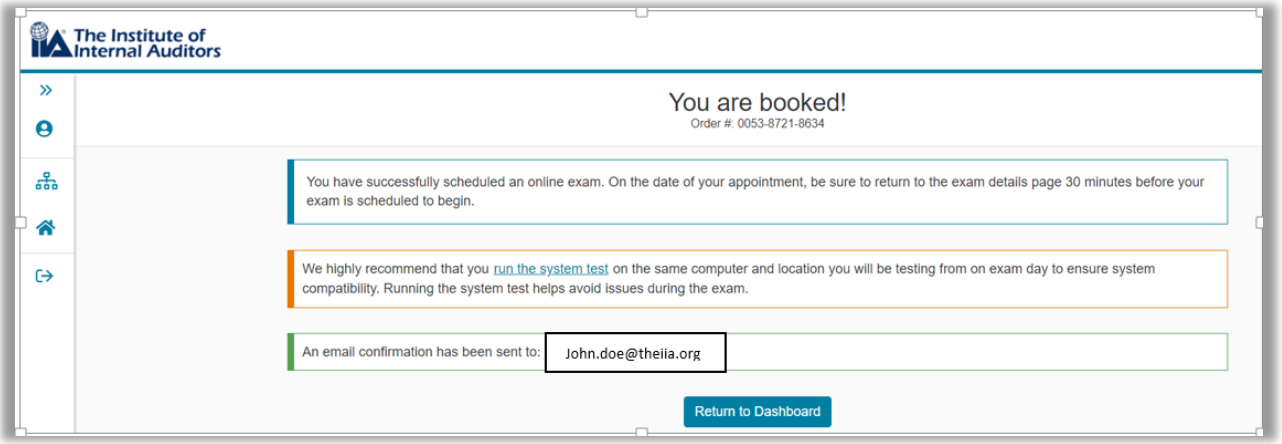
Cart will display. Click **Proceed to Checkout**.



Agree to policies popup will display. Click **Accept.**



The online exam is booked and a confirmation is received. The candidate can sign-out, **Return to Dashboard** or click **Return to Testing Program website** at the top left by clicking on the **Home** icon.



Exam Results

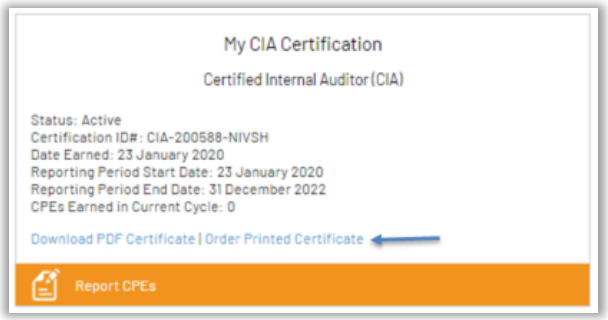
You will receive a preliminary score report at the test center. Approximately 48-hours after the completion of an exam the IIA receives the results from PearsonVUE. Once posted you will receive an email notification you're your official exam results.

Certification Granted

Once you have passed all of your exams, you will receive a notification email.

In CCMS *My (Program Name) Certification* tile is now displayed on the right of browser window with certification information.

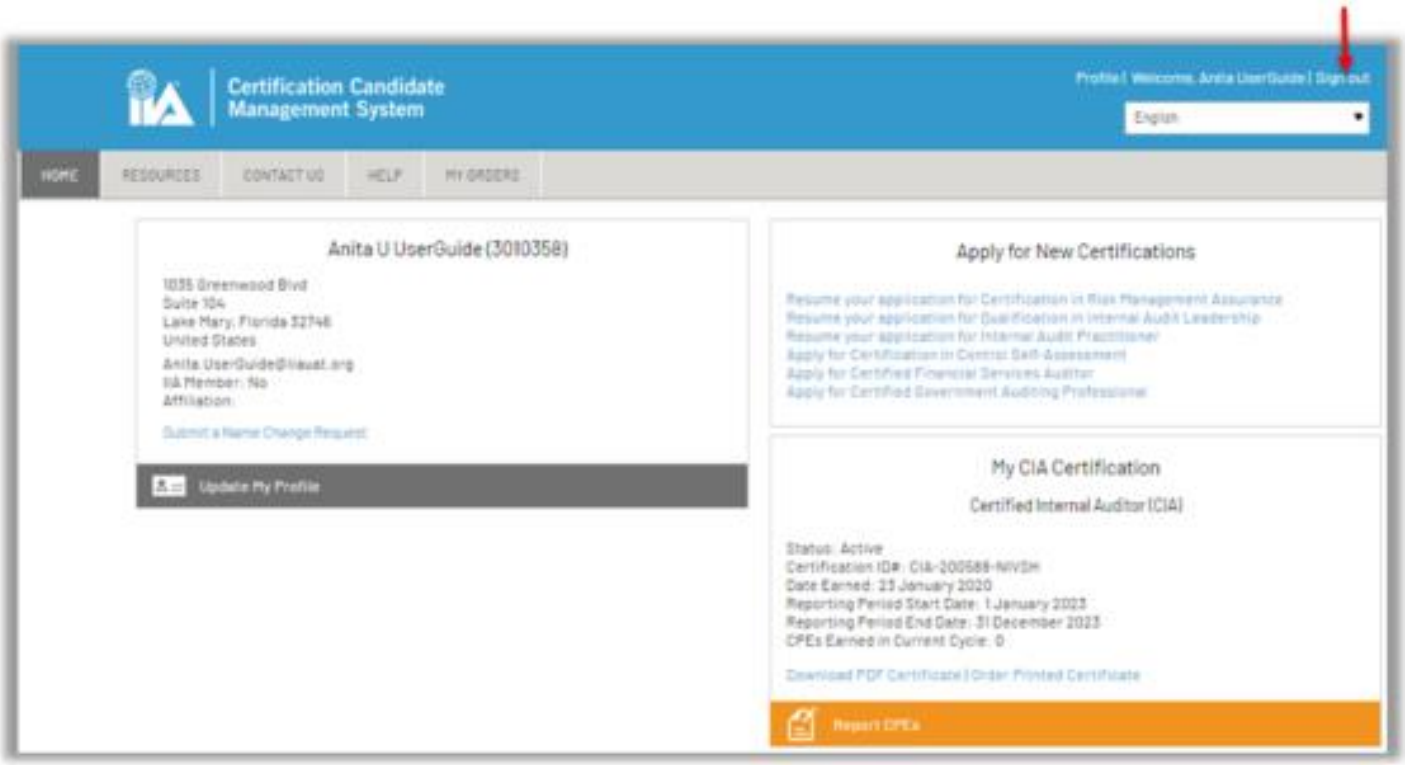
To download a certificate, click **Download PDF Certificate.**



To order a printed certificate, click **Order Printed Certificate.**

Sign Out

To exit CCMS, click **Sign Out** on top right of browser window:



Sign out message will appear and you will have successfully signed out of the system.

Glossary

Term	Definition
CCMS	Certification Candidate Management System.
CIA	Certified Internal Auditor.
CPE	Continuing Professional Education.
CRM	Customer Relationship Management (software).
CRMA	Certification in Risk Management Assurance.
EBEs	Event Based Emails.
GAN	Global Account Number.
IIA HQ	Institute of Internal Auditors Headquarters.
PDF	Portable Document Format.

Revision History/Document Version

Date	Version	Updates	Name/Title
2/18/20	1.0	Document Creation	Anita Sukhraj/QA Engineer
7/29/20	2.0	Document Updates	Anita Sukhraj/QA Engineer
9/02/20	3.0	Document Updates/Revisions	Anita Sukhraj/QA Engineer