



**MyCPIM Worksheet – OTA Annual Winter Conference & Trade Show – January 25-28, 2017**

**DID YOU KNOW?**

ALL township (and other government subdivision) fiscal officers are required to comply with ORC §135.22 by EITHER participating in continuing education hosted or accredited by the Treasurer of State’s CPIM program or requesting a certified Notice of Exemption from CPIM education. For more information on how to determine which requirement pertains to your government subdivision, please visit: <http://ohiotreasurer.gov/cpim/faq/>.

In February 2016, the Treasurer of State’s office launched **MyCPIM**, which serves as a one-stop-shop, online reporting system to service all CPIM needs: report CPIM hours, pay your Annual CPIM Certification Fee, print annual Certificates of Completion once your requirements are complete, request certification of a Notice of Exemption, and more.

**To report your CPIM hours for this conference, please follow the steps below.**

**To request certification of a Notice of Exemption, please follow the instructions on the back.**

**If you need help, please visit us during the conference in (HALLWAY OF POD B) or call us at (800) 228-1102.**

**Hours must be reported by 5:00pm on February 1, 2017. Hours will not be credited after this time.**

**TO REPORT CPIM HOURS EARNED AT THIS CONFERENCE**

**Step 1** Go to [cpim.tos.ohio.gov](http://cpim.tos.ohio.gov) and log in by clicking on the **MyCPIM Login** button and entering your email address and password.

*TIP* **If you have never logged into MyCPIM before** and have earned CPIM hours or requested certification of a Notice of Exemption in the past five years, your account information has been migrated into **MyCPIM**. Please follow the instructions in the yellow box on the log in page to recover your account. If you have never interacted with CPIM or haven’t in the past five years, please create a new account.

**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 listings 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 end time has passed and before 5:00pm on February 1, 2017. 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 evaluation. Click “Report Hours.”

*TIP* To help accurately and successfully report your hours, please use the grid below to take note of all hours attended and course passwords. If correctly submitted, a green confirmation box will appear in the lower right corner of the screen, you will receive an email confirmation of your reported hours for this course and on the **MyCPIM** homepage under the “My Previous Courses” tab, this course listing will appear with “Pending Organization Approval” in the “Hours Earned” column.

Date/Time	Course Name	Hrs. Possible	Hrs. Attended	Password
1/25 1:00pm	Cashing Out Investments: The Who, What, When & Why	1.25		
1/25 2:30pm	Funding of Township Roads	1.25		
1/26 1:00pm	Explanation of Millage: Ins & Outs of Funding Townships Receive	1.25		
1/26 1:00pm	Process for Estimating Expenses in the Next Budget	1.25		
1/26 2:45pm	New JEDD Law	1.25		

*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 session, you should report 1.25 hours if the “Hours Possible” for that course is 1.5 hours.*

**(Continued on back)**

Date/Time	Course Name	Hrs. Possible	Hrs. Attended	Password
1/27 8:45am	New JEDD Law	1.0		
1/27 8:45am	Fraud Red Flags & Proactive Prevention Activities	1.0		
1/27 8:45am	Audits for New(er) Fiscal Officers	1.0		
1/27 10:15am	Explanation of Millage: Ins & Outs of Funding Townships Receive	1.0		
1/27 10:15am	Grant Management & Resources	1.0		
1/27 10:15am	Developing a Budget: Fire, EMS or Police	1.0		
1/27 10:15am	Audits: Most Common Findings & Tips to Improve	1.0		
1/27 10:15am	Fiscal Policies Every Township Should Have	1.0		
1/27 1:45pm	Online Bill Pay & Direct Deposit	1.0		
1/27 3:00pm	Funding of Township Roads	1.0		
1/27 3:00pm	All Aspects of Bidding Out Contracts: Advertising to Awarding	1.0		

*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 session, you should report 1.25 hours if the "Hours Possible" for that course is 1.5 hours.*

**Step 5** REPEAT steps 3 and 4 for additional courses attended.

*TIP If you have a wireless device or internet access with you at the conference, we suggest reporting your hours for each course attended during the 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 the red box, and follow the payment instructions. **You will not receive an invoice.** If you do not pay the Annual CPIM Certification Fee before 12/31/2017, you will NOT receive CPIM hours for these courses.

## TO REQUEST A CERTIFIED NOTICE OF EXEMPTION

**Step 1** Go to [cpim.tos.ohio.gov](http://cpim.tos.ohio.gov) and log in by clicking on the **MyCPIM Login** button and entering your email address and password.

*TIP If you have never logged into MyCPIM before and have earned CPIM hours or requested certification of a Notice of Exemption in the past five years, your account information has been migrated into MyCPIM. Please follow the instructions in the yellow box on the log in page to recover your account. If you have never interacted with CPIM or haven't in the past five years, please create a new account.*

**Step 2** Once logged in, in the navigation bar, click **EXEMPTION CERTIFICATION**. The name, title, and subdivision fields will be pre-populated with the information from your profile.

*TIP If you have not designated your government subdivision(s) in your profile yet, please do so before continuing. If you need help adding a subdivision to your profile, please visit our table at the conference or call us.*

**Step 3** 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**.

*TIP 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.*

*TIP #2 Only the first subdivision listed in your profile will pre-populate. If you need to request certification for more than one government subdivision, you may do so by repeating these steps, using the type-ahead function of the subdivision field to populate a different government subdivision. Users are able to file one exemption per subdivision, per year.*

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