CCMS - Candidate Management System Quick Start Guide
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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.
Getting Started

Account Creation
To sign in to CCMS, create an account.

- Access [www.theiia.org/ccms](http://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

Apply for New Certifications
- Apply for Certified Internal Auditor
- Apply for Certification in Risk Management Assurance
- Apply for Qualification in Internal Audit Leadership
- Apply for Internal Audit Practitioner
- Apply for Certification in Control Self-Assessment
- Apply for Certified Financial Services Auditor
- Apply for Certified Government Auditing Professional

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

**Alert**
You must contact your local affiliate to initiate this transaction. Once payment has been processed, you will receive an email communication with instructions to complete this transaction.

- Czech Republic: ciaa@intenaudit.cz | +222 263 761
- Indonesia: info@ilia-indonesia.org | +62 218378 2174
- Korea: gyin@korea.or.kr | +82 02-3487-1652
- Japan: cia@aila.or.jp | +81 (3) 6214-2232
- Thailand: auditors@thia.or.th | +66 2 772 9124
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 offence, 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**.

![Special Accommodations Form](image)

**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.
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.
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.

  ![Exam Registration and Scheduling](image)

  - 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.
Find an appointment

IIA—CIA—Part1, CIA Part One - Essentials of Internal Auditing

zTest Lab - IIA CTT Lab
The Institute of Internal Auditors
247 Mailland Ave
Allamante Springs, Florida 32701
United States

Select Date
Why can’t I find an available appointment?

<table>
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<tr>
<th>Su</th>
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<th>We</th>
<th>Th</th>
<th>Fr</th>
<th>Sa</th>
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<td>31</td>
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Select a date from the calendar. Only available dates can be selected.

Available start times: Thursday, May 7, 2020 at zTest Lab - IIA CTT Lab
Times shown in: America/New_York - EDT [Show 24-hour]

<table>
<thead>
<tr>
<th>Morning</th>
<th>Afternoon</th>
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<tbody>
<tr>
<td>06:00 AM</td>
<td>12:00 PM</td>
</tr>
<tr>
<td>06:15 AM</td>
<td>12:15 PM</td>
</tr>
<tr>
<td>08:30 AM</td>
<td>12:30 PM</td>
</tr>
<tr>
<td>08:45 AM</td>
<td>12:45 PM</td>
</tr>
<tr>
<td>09:00 AM</td>
<td>01:00 PM</td>
</tr>
<tr>
<td>08:15 AM</td>
<td>01:15 PM</td>
</tr>
</tbody>
</table>
Cart will display.

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

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exam</td>
<td>Appointment</td>
<td>0.00</td>
</tr>
<tr>
<td>IA-CC-Part1: CIA Part One - Essentials of Internal Auditing</td>
<td>Thursday, May 7, 2020</td>
<td></td>
</tr>
<tr>
<td>Language: English</td>
<td>Start Time: 06:45 AM EDT</td>
<td></td>
</tr>
<tr>
<td>Exam Length: 150 minutes</td>
<td>Location</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Test Lab - IA CTT Lab</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Institute of Internal Auditors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>247 Northland Ave</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Altamonte Springs, Florida 32711</td>
<td></td>
</tr>
<tr>
<td></td>
<td>United States</td>
<td></td>
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**Exams for**

<table>
<thead>
<tr>
<th>Name</th>
<th>CCMS User/Guest1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate ID</td>
<td>4015949</td>
</tr>
</tbody>
</table>

**Order Total**

<table>
<thead>
<tr>
<th>Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtotal</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax</td>
<td>0.00</td>
</tr>
<tr>
<td>TOTAL DUE</td>
<td>USD 0.00</td>
</tr>
</tbody>
</table>

**TOTAL DUE: USD 0.00**
Click **Submit Order**. Confirmation page will appear.
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:

Dashboard

Institute of Internal Auditors Exams
Pre-approved Exams
- IIA-CIA-Part2: CIA Exam Part Two: Practice of Internal Auditing

Upcoming Appointments
You do not have any appointments scheduled.

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 Screen](image)

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

**Sign out**

*You have successfully signed out.*
## Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tr>
<td>CCMS</td>
<td>Certification Candidate Management System.</td>
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<tr>
<td>CIA</td>
<td>Certified Internal Auditor.</td>
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<tr>
<td>CPE</td>
<td>Continuing Professional Education.</td>
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<tr>
<td>CRM</td>
<td>Customer Relationship Management (software).</td>
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<tr>
<td>CRMA</td>
<td>Certification in Risk Management Assurance.</td>
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<tr>
<td>EBEs</td>
<td>Event Based Emails.</td>
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<tr>
<td>GAN</td>
<td>Global Account Number.</td>
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<td>IIA HQ</td>
<td>Institute of Internal Auditors Headquarters.</td>
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<td>PDF</td>
<td>Portable Document Format.</td>
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## Revision History/Document Version

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