



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

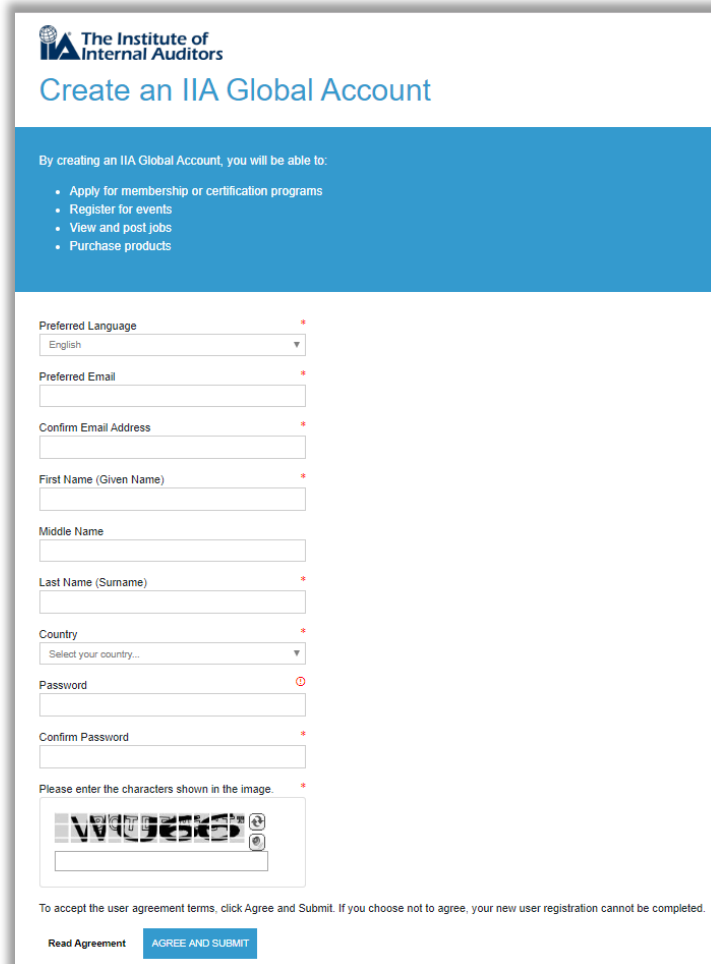
Account Creation

To sign in to CCMS, create an account.

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

<p>Sign In</p> <p><input type="button" value="SIGN IN"/></p>	<p>Don't have an account yet?</p> <p><input type="button" value="CREATE ACCOUNT"/></p>	<p>Forgot your password?</p> <p><input type="button" value="RESET"/></p>
--	--	--

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



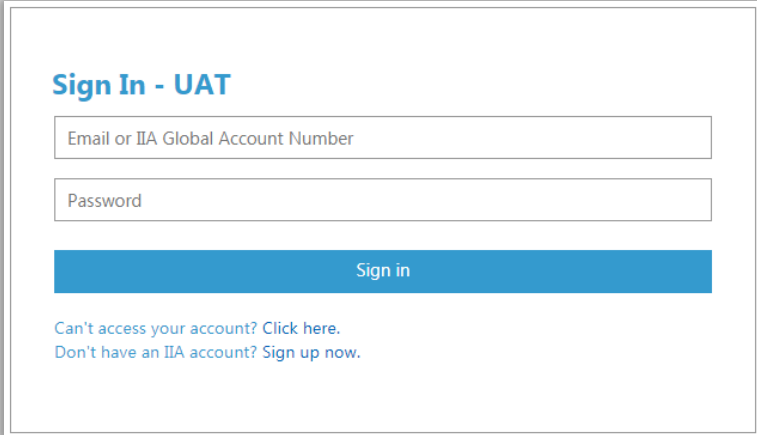
The screenshot shows the 'Create an IIA Global Account' page. At the top, it features the IIA logo and the title 'Create an IIA Global Account'. Below the title, a blue banner contains the text: 'By creating an IIA Global Account, you will be able to:' followed by a bulleted list: 'Apply for membership or certification programs', 'Register for events', 'View and post jobs', and 'Purchase products'. The main form area contains several input fields, each with a red asterisk indicating a required field: 'Preferred Language' (dropdown menu with 'English' selected), 'Preferred Email' (text input), 'Confirm Email Address' (text input), 'First Name (Given Name)' (text input), 'Middle Name' (text input), 'Last Name (Surname)' (text input), 'Country' (dropdown menu with 'Select your country...' selected), 'Password' (text input with a strength indicator), 'Confirm Password' (text input), and a CAPTCHA section with the instruction 'Please enter the characters shown in the image.' and a grid of characters. At the bottom, there is a 'Read Agreement' link and an 'AGREE AND SUBMIT' button. A small disclaimer at the bottom reads: 'To accept the user agreement terms, click Agree and Submit. If you choose not to agree, your new user registration cannot be completed.'

- 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**.



Sign In - UAT

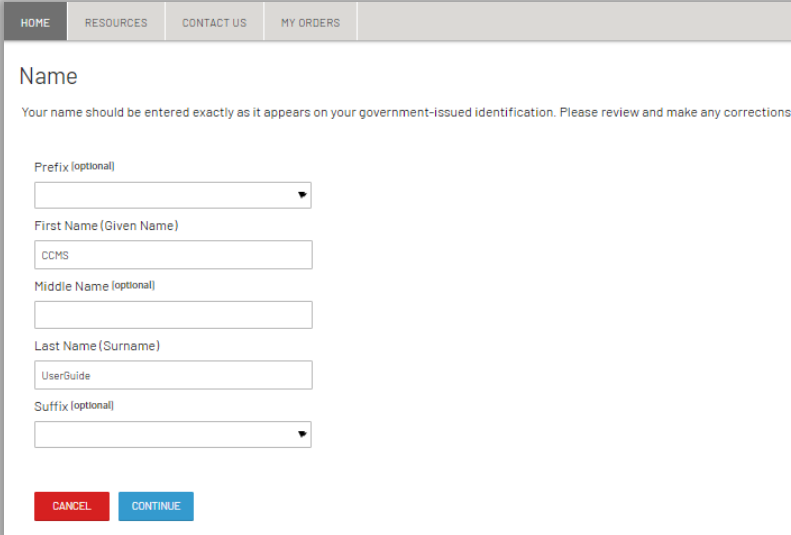
Email or IIA Global Account Number

Password

Sign in

[Can't access your account? Click here.](#)
[Don't have an IIA account? Sign up now.](#)

Complete Profile



HOME RESOURCES CONTACT US MY ORDERS

Name

Your name should be entered exactly as it appears on your government-issued identification. Please review and make any corrections.

Prefix (optional)

First Name (Given Name)

Middle Name (optional)

Last Name (Surname)

Suffix (optional)

CANCEL CONTINUE

- 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:

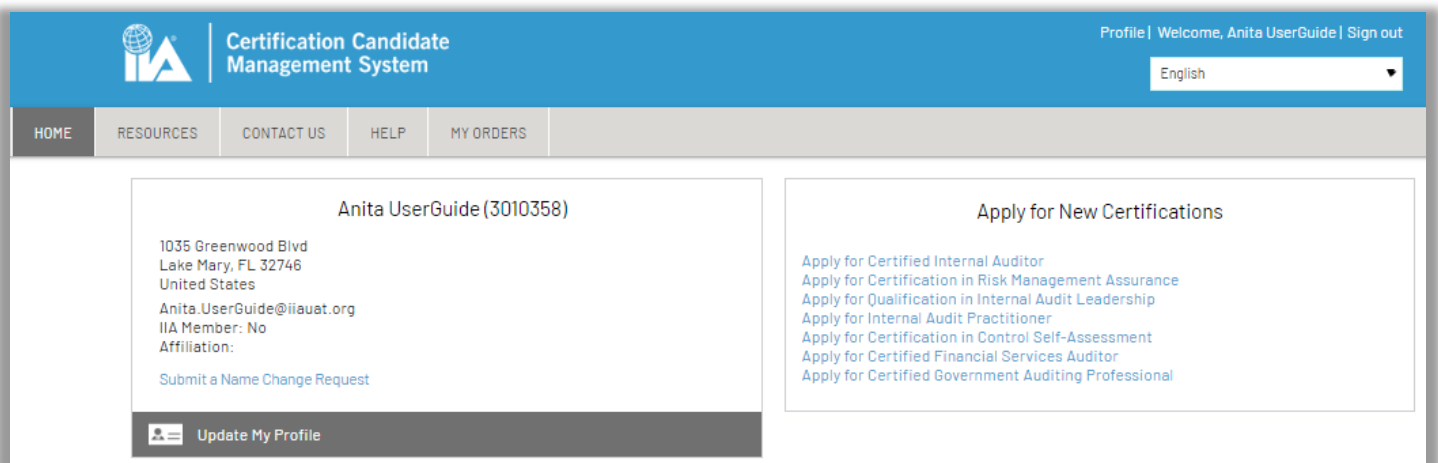
- Address Line 1
- City

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

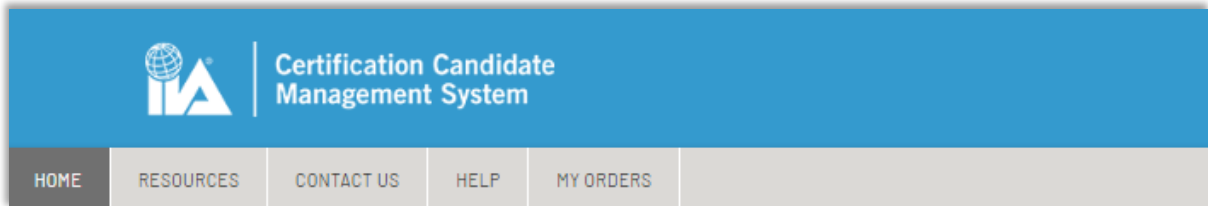
Certificate Candidate Management System (CCMS) Home page is displayed.



The screenshot shows the CCMS Home Page. At the top, there is a blue header with the IIA logo and the text "Certification Candidate Management System". On the right side of the header, there is a user profile section with the text "Profile | Welcome, Anita UserGuide | Sign out" and a language dropdown menu set to "English". Below the header is a navigation bar with links for HOME, RESOURCES, CONTACT US, HELP, and MY ORDERS. The main content area is divided into two columns. The left column is titled "Anita UserGuide (3010358)" and contains the following information: "1035 Greenwood Blvd", "Lake Mary, FL 32746", "United States", "Anita.UserGuide@iiauat.org", "IIA Member: No", "Affiliation:", and a link "Submit a Name Change Request". At the bottom of this column is a button "Update My Profile". The right column is titled "Apply for New Certifications" and contains a list of links: "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", and "Apply for Certified Government Auditing Professional".


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) → Anita UserGuide (3010358)
- Candidate's Address → 1035 Greenwood Blvd
Lake Mary, FL 32746
United States
- Candidates' Email Address → Anita.UserGuide@iiauat.org
- IIA Member: Yes/No → IIA Member: No
- Affiliation: (if applicable) → Affiliation:
- Submit a Name Change Request → Submit a Name Change Request
- Update my Profile →  Update My Profile

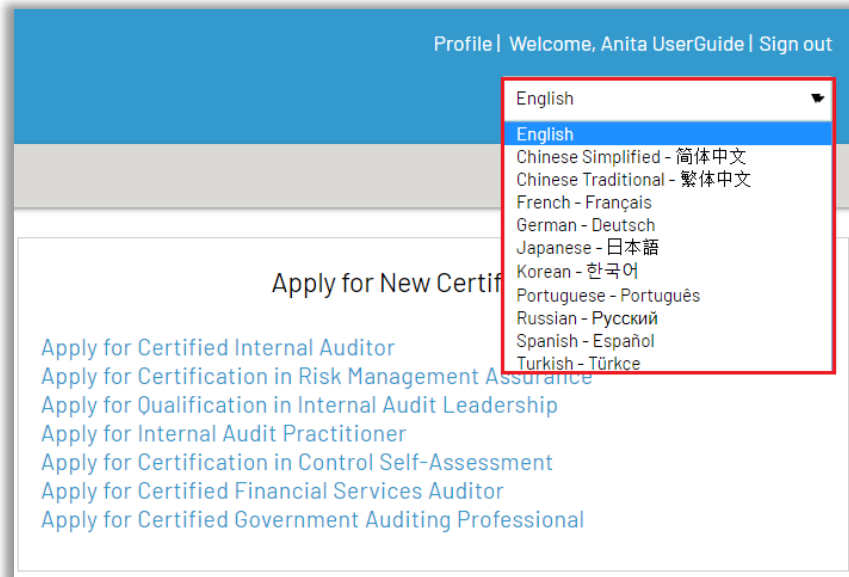
Apply for New Certifications

[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](#).

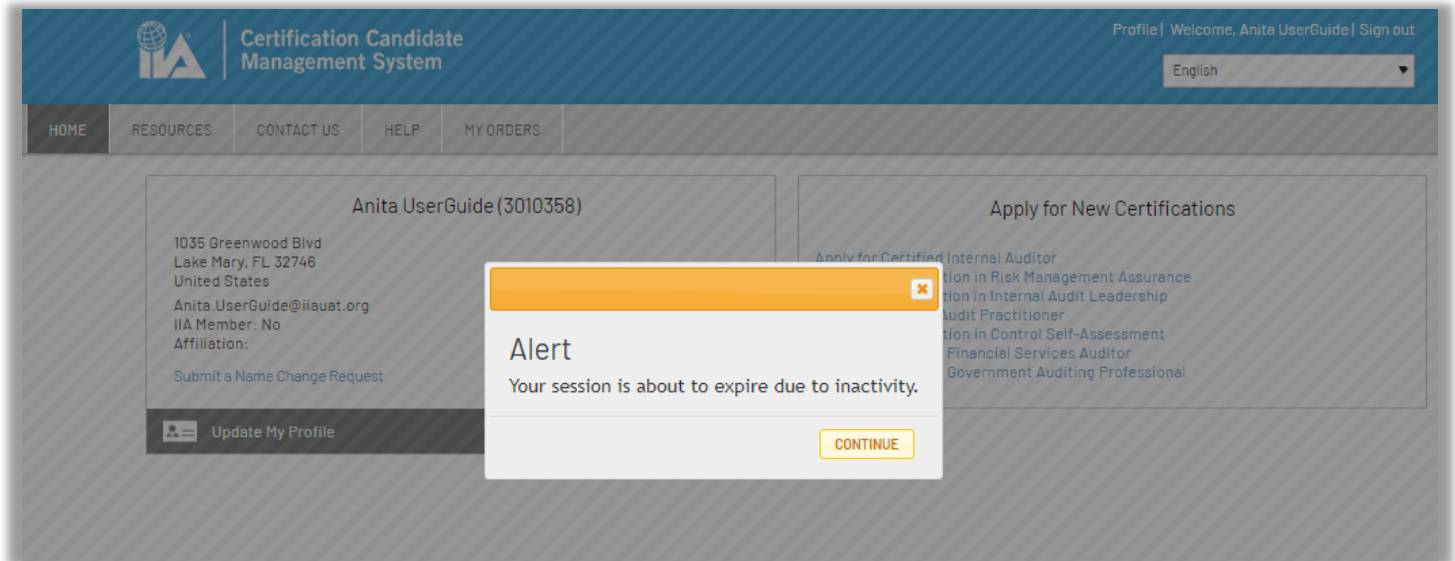


To select a Language preference, simply select an applicable language from drop-down and the page will translate to the selected language.



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.

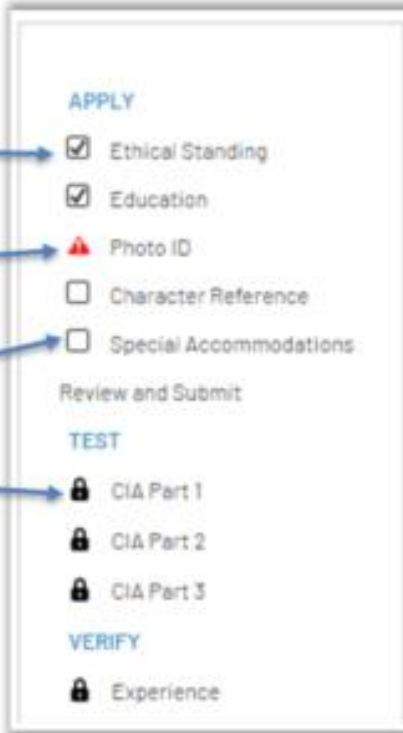
Sign out

You have successfully signed out.

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.

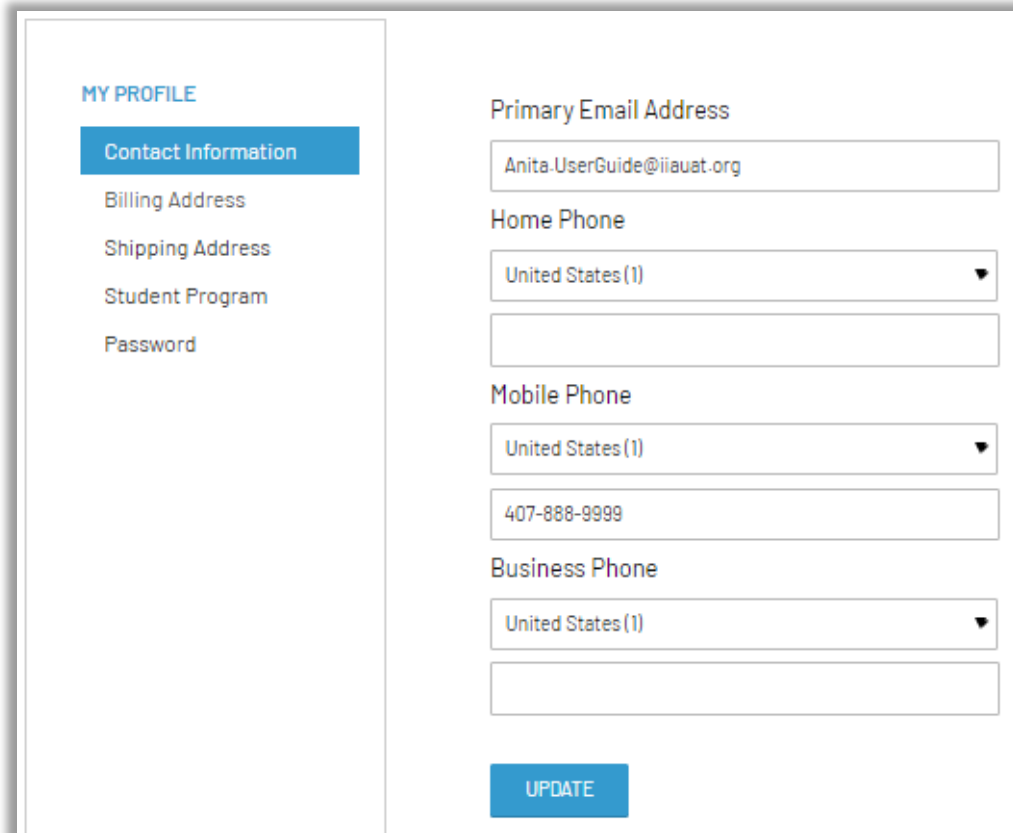


The screenshot shows a vertical list of steps under three main sections: APPLY, TEST, and VERIFY. Each step has a corresponding icon indicating its status. Blue arrows point from the legend items to the corresponding icons in the screenshot.

Section	Step	Status Icon
APPLY	Ethical Standing	Checked Box
	Education	Checked Box
	Photo ID	Alert (Red Triangle)
	Character Reference	Open Checkbox
	Special Accommodations	Open Checkbox
Review and Submit		
TEST	CIA Part 1	Lock
	CIA Part 2	Lock
	CIA Part 3	Lock
VERIFY	Experience	Lock

Update My Profile

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



The screenshot shows a web interface for updating a profile. On the left is a sidebar with a 'MY PROFILE' section containing five menu items: 'Contact Information' (highlighted in blue), 'Billing Address', 'Shipping Address', 'Student Program', and 'Password'. The main content area is titled 'Primary Email Address' and contains a text input field with the email 'Anita.UserGuide@iiauat.org'. Below this are three phone number sections: 'Home Phone' with a dropdown menu set to 'United States (1)' and an empty text input field; 'Mobile Phone' with a dropdown menu set to 'United States (1)' and a text input field containing '407-888-9999'; and 'Business Phone' with a dropdown menu set to 'United States (1)' and an empty text input field. At the bottom of the form is a blue 'UPDATE' button.

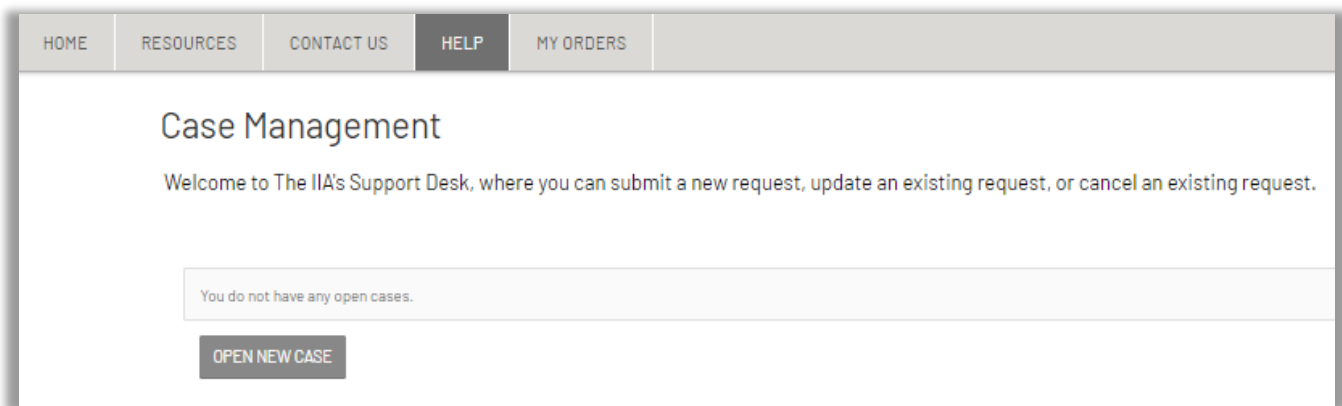
My Profile allows you to update contact information, billing address, and shipping address, apply for student program, and reset your password.

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.

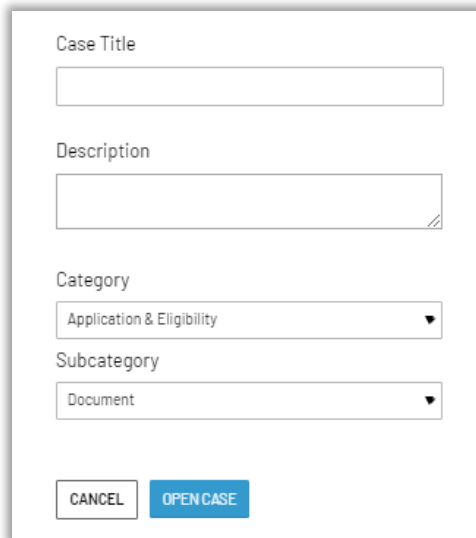
To access Case Management:

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



The screenshot shows the Case Management page with a navigation bar containing HOME, RESOURCES, CONTACT US, HELP, and MY ORDERS. The main heading is "Case Management" with a sub-heading "Welcome to The IIA's Support Desk, where you can submit a new request, update an existing request, or cancel an existing request." Below this is a message box stating "You do not have any open cases." and a button labeled "OPEN NEW CASE".

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

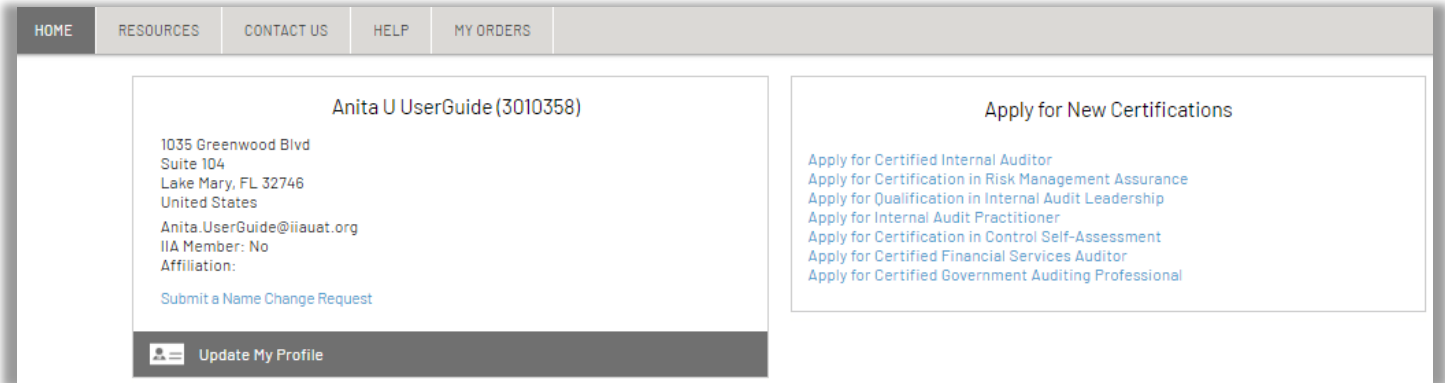


The screenshot shows the "Open New Case" form with the following fields:

- Case Title:
- Description:
- Category:
- Subcategory:
- CANCEL button
- OPEN CASE button

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 Education

Certification candidates must meet the education requirements outlined in the Certification Candidate Handbook*. Please submit one of the following documents as proof of your education:

- Copy of your degree or official transcript.
(If your name has changed since you earned your degree, you must also submit proof of your legal name change.)
- Letter from a university confirming your degree.
- Letter from an evaluation service confirming your degree level.

*If you do not meet the minimum education requirements, but your experience qualifies you for eligibility (according to the exemption rule outlined in the Certification Candidate Handbook), please select "Other" from the Education Level option below.

For Name of University/Institution below, please enter the name of the university/institution as it appears on your degree, transcript, or diploma.

APPLY

Ethical Standing

Education

Photo ID

Character Reference

Special Accommodations

Review and Submit

TEST

CIA Part 1

CIA Part 2

CIA Part 3

VERIFY

Experience

Education Level

Date Awarded

Name of University/Institution

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**.

Proof of Identification

Please provide identification in the form of a current government-issued photo ID. Expired IDs will not be accepted. All IDs must be scanned in a manner that ensures the ID is legible and your photo is clearly visible.

APPLY

- Ethical Standing
- Education
- Photo ID
- Character Reference
- Special Accommodations

Review and Submit

TEST

- CIA Part 1
- CIA Part 2
- CIA Part 3

VERIFY

- Experience

Photo ID Type

Choose File

ADD FILES...

BACK **SAVE AND EXIT** **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**.

Character Reference

IIA certification candidates must exhibit high moral and professional character and agree to abide by The IIA's Code of Ethics. As part of the certification application process, you are required to obtain a character reference from one of the following:

- An individual holding an active IIA designation.**
 - Your current supervisor.
 - A professor (for students only).

Please identify an appropriate person to serve as your reference and complete the information below. The IIA will email a character reference request to the person you selected, which will include your name and email address.

APPLY

- Ethical Standing
- Education
- Photo ID
- Character Reference
- Special Accommodations

Review and Submit

TEST

- CIA Part 1
- CIA Part 2
- CIA Part 3

VERIFY

- Experience

Character Reference Full Name

Character Reference Title

Character Reference Email Address

Character Reference Preferred Language

Character Reference Company

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

The IIA will make reasonable testing accommodations for certification candidates when appropriate and consistent with legal requirements, such as for candidates with a documented disability that substantially limits their ability to read or otherwise complete the examination.

If you require testing accommodations, please download The IIA's official [Accommodations Application](#). By selecting Yes below, you will be instructed to upload your completed form and any other relevant supporting documentation.

APPLY

- Ethical Standing
- Education
- Photo ID
- Character Reference
- Special Accommodations

Review and Submit

TEST

- CIA Part 1
- CIA Part 2
- CIA Part 3

VERIFY

- Experience

Do you require special accommodations for testing?

- No
- Yes

BACK

SAVE AND EXIT

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.



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.

Proof of Experience

Your certification program's experience requirement is based on the maximum level of education you have achieved. Work experience must be in internal auditing or a related field. Providing proof of your experience is a two-step process:

1. Enter details of your work experience.
2. Obtain verification of your experience.

APPLY

- Ethical Standing
- Education
- Photo ID
- Character Reference
- Special Accommodations

Review and Submit

TEST

- CIA Part 1
- CIA Part 2
- CIA Part 3

VERIFY

- Experience

The minimum required experience for Bachelor's Degree is 24 months.

No valid experience records found.

Months Required	24
Months Entered	0
Months Remaining	24

ADD

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

Experience Verification

APPLY

- Ethical Standing
- Education
- Photo ID
- Character Reference
- Special Accommodations

Review and Submit

TEST

- CIA Part 1
- CIA Part 2
- CIA Part 3

VERIFY

- Experience

This is my current position

Start Date

End Date

Employer

Job Title

Primary Activity

Internal Audit Quality Assurance Risk Management
 Audit/Assessment/Disciplines Compliance External Audit
 Internal Control

City

Country

State/Province

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.

Verification of Experience

Please enter the name and email address of your current supervisor or an IIA designation holder who will receive an email to verify your experience.

APPLY

- Ethical Standing
- Education
- Photo ID
- Character Reference
- Special Accommodations

Review and Submit

TEST

- CIA Part 1
- CIA Part 2
- CIA Part 3

VERIFY

- Experience

Experience Reference Status

Experience Reference Full Name

Experience Reference Preferred Language

Experience Reference Email Address

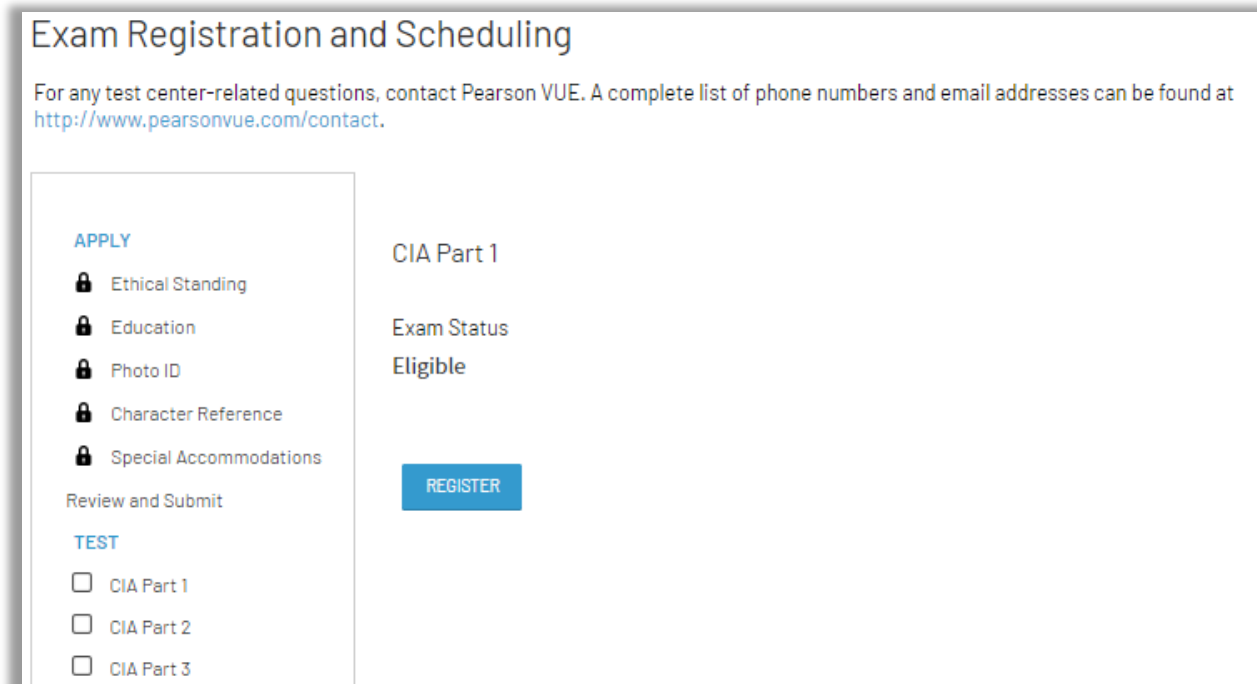
Confirm Experience Reference Email Address

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.



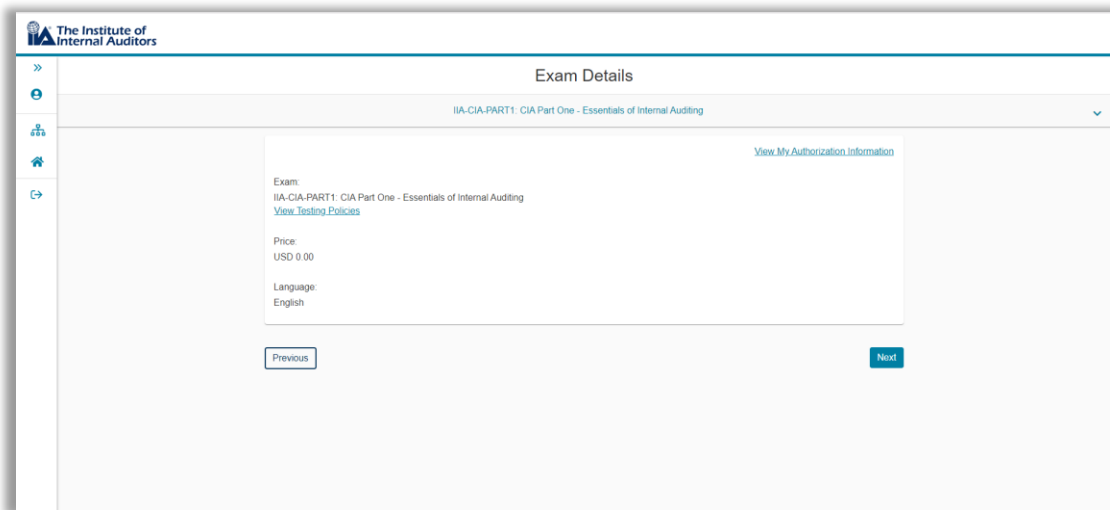
The screenshot shows the 'Exam Registration and Scheduling' page for CIA Part 1. The page title is 'Exam Registration and Scheduling'. Below the title, there is a note: 'For any test center-related questions, contact Pearson VUE. A complete list of phone numbers and email addresses can be found at <http://www.pearsonvue.com/contact>.' The page is divided into two main sections. The left section is titled 'APPLY' and contains a list of requirements, each with a lock icon: 'Ethical Standing', 'Education', 'Photo ID', 'Character Reference', and 'Special Accommodations'. Below these is a 'Review and Submit' button. The right section is titled 'CIA Part 1' and shows 'Exam Status' as 'Eligible'. A blue 'REGISTER' button is located below the status.

- 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**.

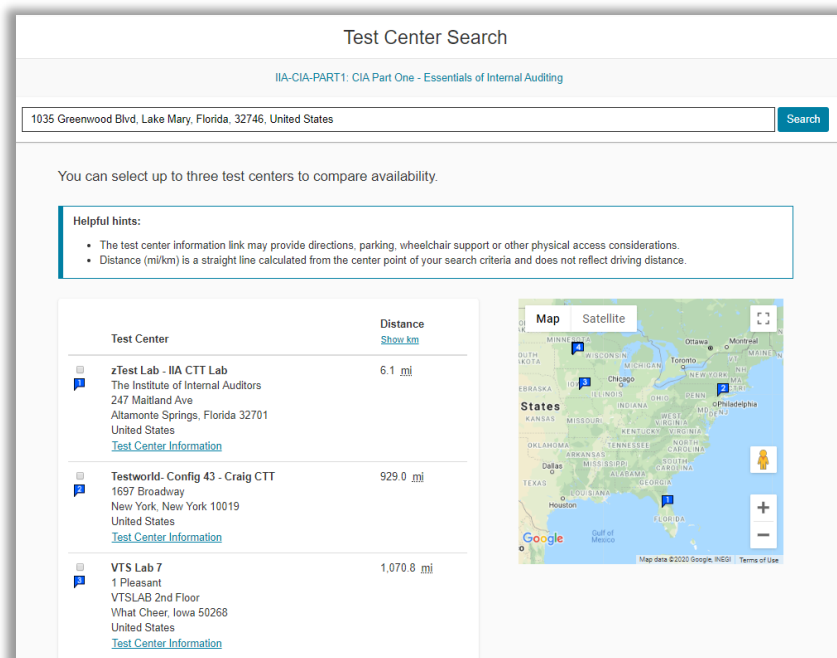
Schedule an Exam

To complete the scheduling process:

- Click **Schedule**. Pearson VUE Exam Details page is displayed.



- Click **Next**. Test Center Search page is displayed.



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

Choose Appointment page will display. Select a Date from the Calendar:

Choose Appointment

IIA-CIA-PART1: CIA Part One - Essentials of Internal Auditing

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

[Change Test Centers](#)

Select Date
[Why can't I find an available appointment?](#)

< February 2020 >

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Select a date from the calendar. Only available dates can be selected.

[Previous](#)

- Available start times for exams will display.
- Select a Time.

Available start times: Wednesday, February 19, 2020 at zTest Lab - IIA CTT Lab
Times shown in: America/New_York - EST [Show 24-hour](#)

Morning	Afternoon
08:00 AM	12:00 PM
08:15 AM	12:15 PM
08:30 AM	12:30 PM
08:45 AM	12:45 PM
09:00 AM	01:00 PM
09:15 AM	01:15 PM

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

Cart

[Review and confirm](#) contact information to avoid issues on test day.

Description	Details	Price	Actions
Exam IIA-CIA-PART1: CIA Part One - Essentials of Internal Auditing Language: English Exam Length: 10 minutes	Appointment Wednesday, February 19, 2020 Start Time: 09:15 AM EST Change Appointment Location zTest Lab - IIA CTT Lab The Institute of Internal Auditors 247 Maitland Ave Altamonte Springs, Florida 32701 United States Change Test Center	0.00	Remove

Confirm contact information

▲ Your name must exactly match the identification (ID) that is presented at time of testing or you will not be able to take your exam.
[Update my information.](#)

Name:
Anita UserGuide1

Telephone:
+1 407-888-9999

Total Due	
Subtotal:	0.00
Estimated Tax:	0.00
ESTIMATED TOTAL DUE:	USD 0.00

ESTIMATED TOTAL DUE: USD 0.00 [Proceed to Checkout](#)

- Agree to Policies and click **Accept**. *Order Details* will display:

Almost there...

Description	Details	Price
Exam IIA-CIA-PART1: CIA Part One - Essentials of Internal Auditing Language: English Exam Length: 10 minutes	Appointment Wednesday, February 19, 2020 Start Time: 09:15 AM EST Location zTest Lab - IIA CTT Lab The Institute of Internal Auditors 247 Maitland Ave Altamonte Springs, Florida 32701 United States	0.00

Exams for	
Name: Anita UserGuide1	
Candidate ID: 3014542	

Order Total	
Subtotal:	0.00
Tax:	0.00
TOTAL DUE:	USD 0.00
	USD 0.00

[Previous](#) [Cancel Order](#)

TOTAL DUE: USD 0.00 [Submit Order](#)

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

You are booked!

Order #: 0000-1032-9947

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

[Return to Dashboard](#)

Description	Details	Order Information	Price
Exam IIA-CIA-PART1: CIA Part One - Essentials of Internal Auditing	Appointment Wednesday, February 19, 2020 Start Time: 09:15 AM EST	Order Number/Invoice 0000-1032-9947 Registration ID 210375993 Status Scheduled	0.00
Language: English Exam Length: 10 minutes	Location zTest Lab - IIA CTT Lab Test Center Information		

Exams for	Order Total
Name: Anita UserGuide1	Subtotal: 0.00
Candidate ID: 3014542	Tax: 0.00
	TOTAL PAID: USD 0.00

Institute of Internal Auditors Policies

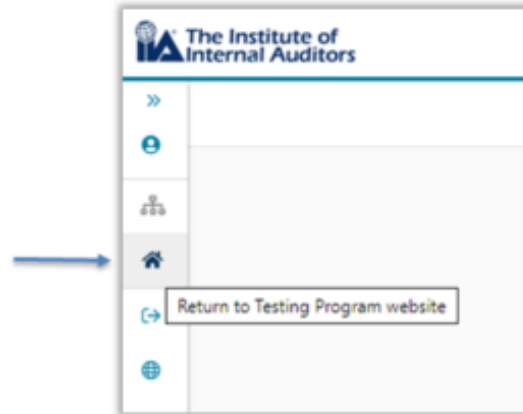
Admission Policy

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.

The scheduling process is complete. You may 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*.

Depending on the program, repeat the steps above until all exams for the program have been successfully completed.



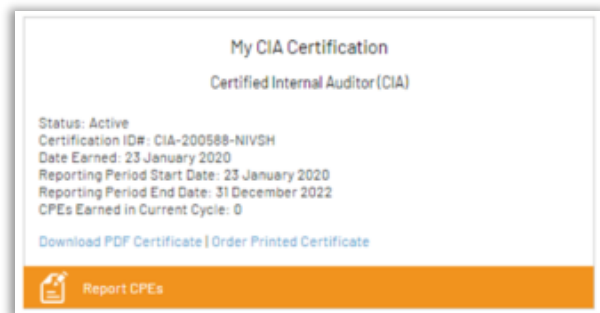
Exam Results

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.



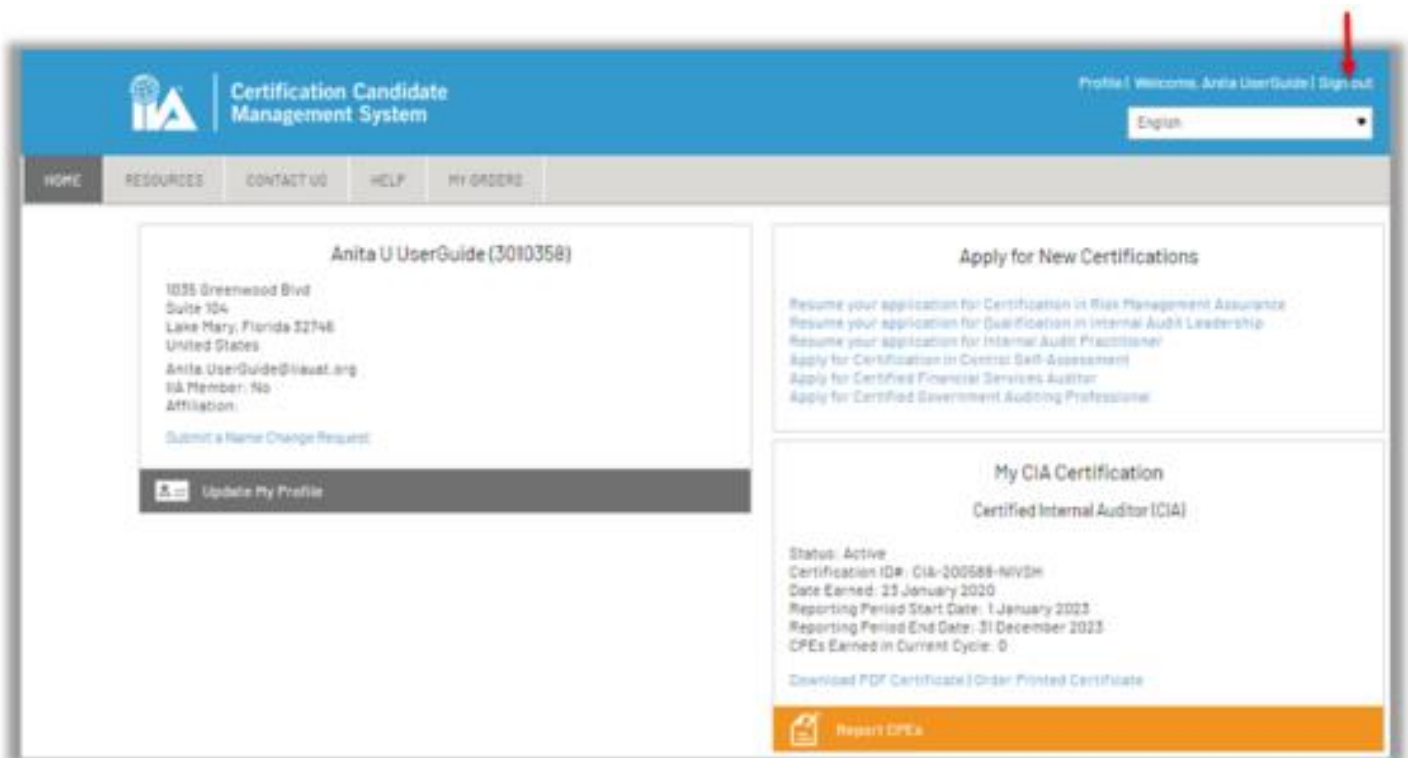
To download a certificate, click **Download PDF Certificate**.



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.

Sign out

You have successfully signed out.