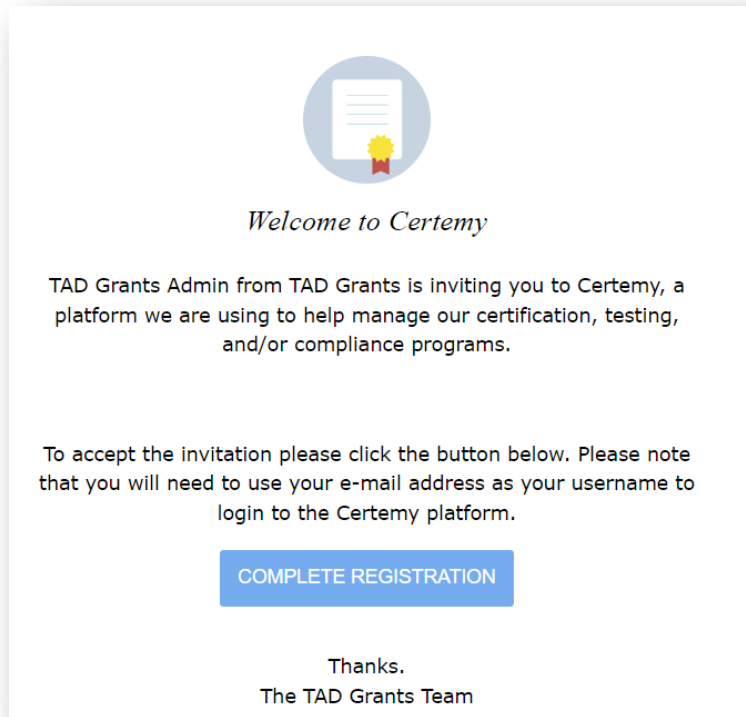


Renewal Process

TAD Grants received your request to renew your Certified Business Services Consultant Certification (CBSC). As stated, within 48 hours you now have received an email from TAD Grants' Certemy to complete your registration. ***There is no fee to complete this registration.***

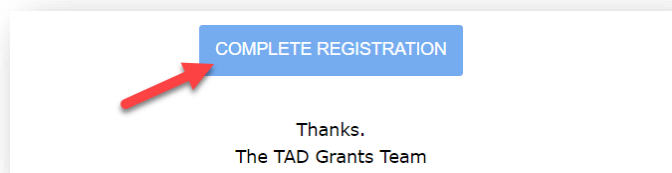


Now it's time to set up your renewal process to keep your certification active. The renewal process ensures that you are engaged in ongoing updates of your professional knowledge and technical competence.

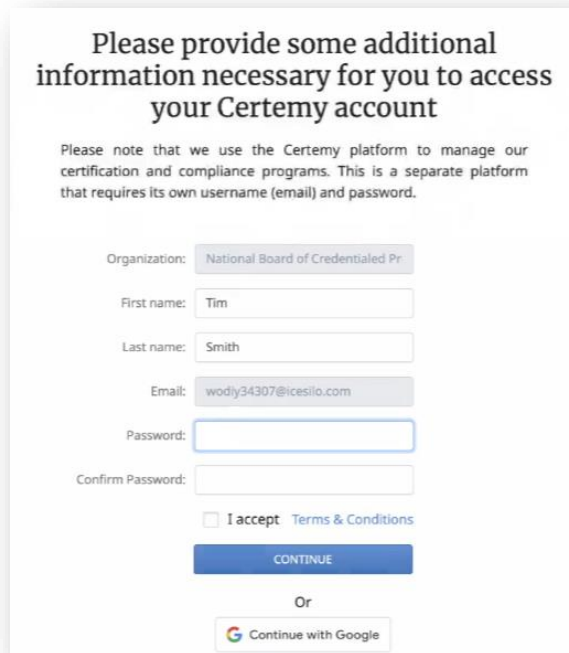
Remember the Certified Business Services Consultant Certification must be renewed every two years on or prior to the issued date of the year that the certification expires. You may upload documents for proof of training to your "Digital Wallet" anytime during the two-year timeframe. Follow the instructions below showing you how to complete the renewal process.

Step by Step Instructions

Once you receive the Welcome email above, you can begin by clicking the **Complete Registration** link.



Next complete the registration by creating a password and confirming that password for your account.



Please provide some additional information necessary for you to access your Certemy account

Please note that we use the Certemy platform to manage our certification and compliance programs. This is a separate platform that requires its own username (email) and password.

Organization: National Board of Credentialed Pr

First name: Tim

Last name: Smith

Email: wody34307@icesilo.com


Password:

Confirm Password:

I accept [Terms & Conditions](#)

CONTINUE

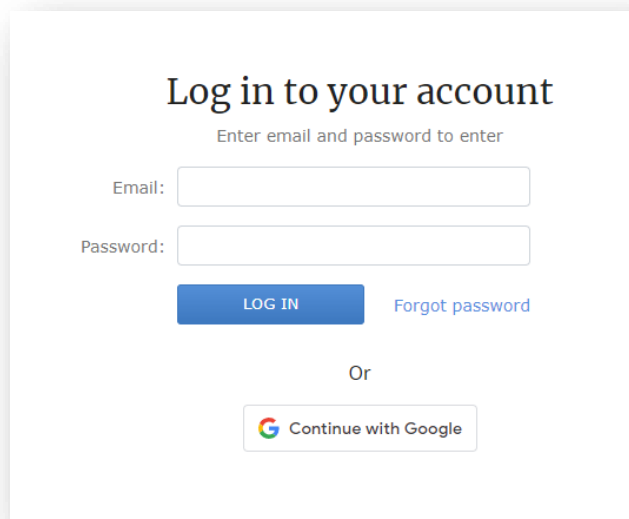
Or



Followed by checking the box to accept our Terms & Conditions. Then, click the **Continue** button to log in for the first time.

Recommend you bookmark the following link to log into your account in the future.

<https://tadgrants.certemy.com/entry/login>



Log in to your account

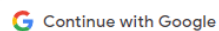
Enter email and password to enter

Email:

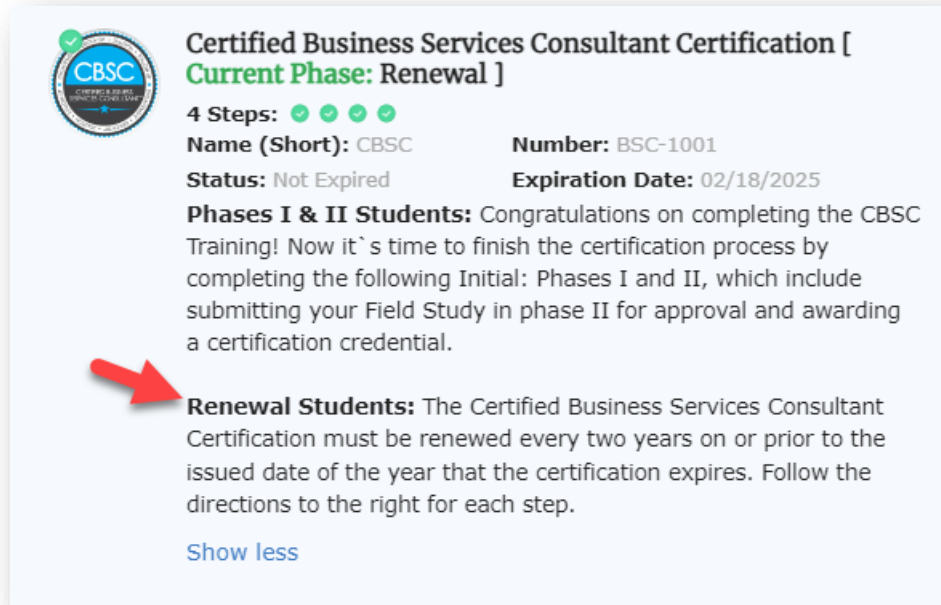
Password:


LOG IN [Forgot password](#)

Or



Once logged in, you will see your assigned credentials on the left side of the screen called My Credentials. You not required to completed Phases I and II (that is for new students), so you have access to the Certified Business Services Consultant Certification [Current Phase: Renewal] phase only. The left side of the screen shows the Certified Business Services Consultant Certification Phases instructions.



 **Certified Business Services Consultant Certification [Current Phase: Renewal]**

4 Steps: ● ● ● ●

Name (Short): CBSC **Number:** BSC-1001

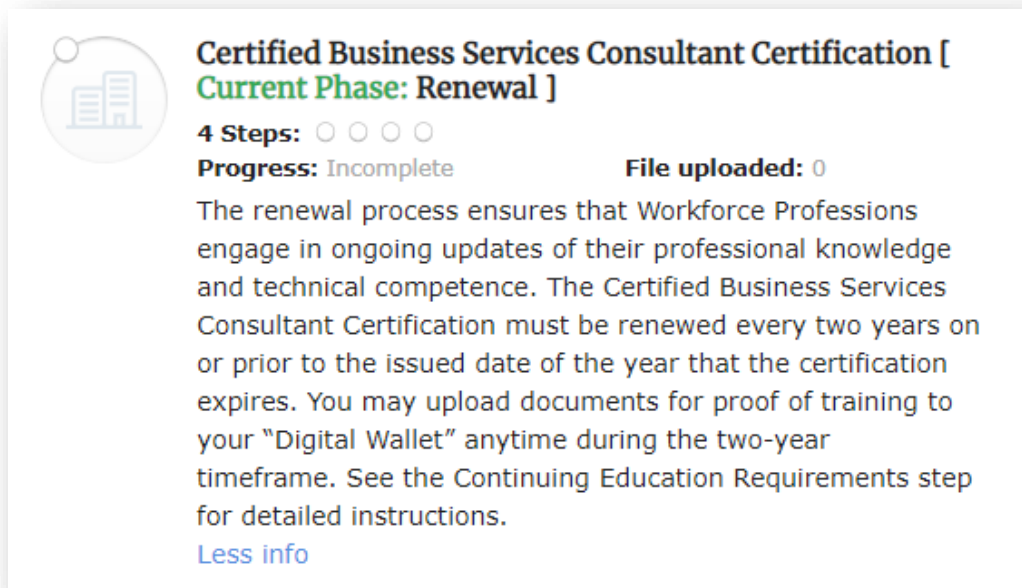
Status: Not Expired **Expiration Date:** 02/18/2025


Phases I & II Students: Congratulations on completing the CBSC Training! Now it`s time to finish the certification process by completing the following Initial: Phases I and II, which include submitting your Field Study in phase II for approval and awarding a certification credential.

Renewal Students: The Certified Business Services Consultant Certification must be renewed every two years on or prior to the issued date of the year that the certification expires. Follow the directions to the right for each step.

[Show less](#)

Your attention is on the right side of the screen, where the renewal instructions are listed that include the credential name, current phase, number of steps, progress, and number of files uploaded for this phase.



 **Certified Business Services Consultant Certification [Current Phase: Renewal]**

4 Steps: ○ ○ ○ ○

Progress: Incomplete **File uploaded:** 0

The renewal process ensures that Workforce Professions engage in ongoing updates of their professional knowledge and technical competence. The Certified Business Services Consultant Certification must be renewed every two years on or prior to the issued date of the year that the certification expires. You may upload documents for proof of training to your "Digital Wallet" anytime during the two-year timeframe. See the Continuing Education Requirements step for detailed instructions.

[Less info](#)

Directly below this information, you will see a section labeled Uploaded Files. This is where you will see a list of every file and document you have uploaded while completing renewal credential steps (once you upload any documents). These are the evidence files you will upload to the Digital Wallet. You can click any one of these file names to download and open the related document.



2 Uploaded Files	Hide
Certificate of Completion.docx	12.4 KB
Certificate of Completion.docx	12.4 KB

Below are the steps associated with the renewal credential process and these steps are to be completed in order.

Steps

- Personal Information**
Dynamic form Incomplete Due: 02/18/2025
Please provide your personal information.
- Current Employment**
Dynamic form Incomplete Due: 02/18/2025
Please provide your organization's information.
- Continuing Education**
Education Incomplete Due: 02/18/2025
Hours: Incomplete (20), Pending verification (0), Completed (0)
As a CBSC credential holder, you will be responsible for recording your continuing education on the credentialing...
- Renewal Fee (only after Continuing Education is verified)**
Fees Incomplete Due: 02/18/2025
Use a credit card to pay the fee by selecting the "Pay Fee" button or selecting the "3rd party payment" button if paying...

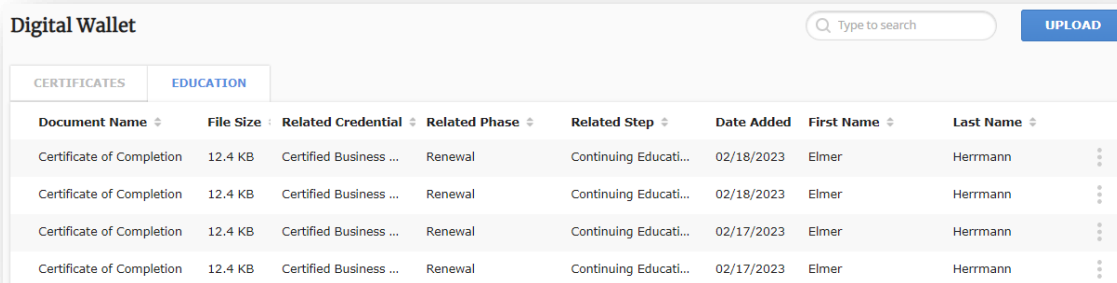
Returning to the top menu bar, that includes buttons for Digital Wallet, Transcripts, User Guide, Profile Details, and the Log Out button.

My Credentials Digital Wallet Transcripts User Guide  Sally German
Professional at TAD Grants 

Digital Wallet

Start by clicking the **Digital Wallet** button to view all your files and documents. These files include any evidence files you have uploaded plus any certificates that have been issued by TAD Grants or other training organizations proving a successfully completed credential.

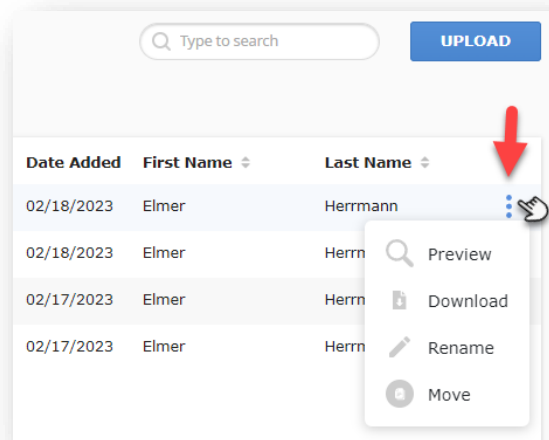
Note that each document has the related credential, phase, and step it's related to.



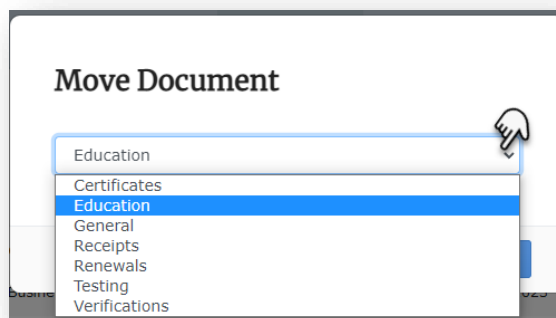
The screenshot shows the 'Digital Wallet' interface with a search bar and an 'UPLOAD' button. Below is a table with columns for Document Name, File Size, Related Credential, Related Phase, Related Step, Date Added, First Name, and Last Name. The table contains four rows of data, all for 'Certificate of Completion' documents.

Document Name	File Size	Related Credential	Related Phase	Related Step	Date Added	First Name	Last Name
Certificate of Completion	12.4 KB	Certified Business ...	Renewal	Continuing Educati...	02/18/2023	Elmer	Herrmann
Certificate of Completion	12.4 KB	Certified Business ...	Renewal	Continuing Educati...	02/18/2023	Elmer	Herrmann
Certificate of Completion	12.4 KB	Certified Business ...	Renewal	Continuing Educati...	02/17/2023	Elmer	Herrmann
Certificate of Completion	12.4 KB	Certified Business ...	Renewal	Continuing Educati...	02/17/2023	Elmer	Herrmann

Here you can click on any document's three dots to see more options, such as download, delete, rename, or move.

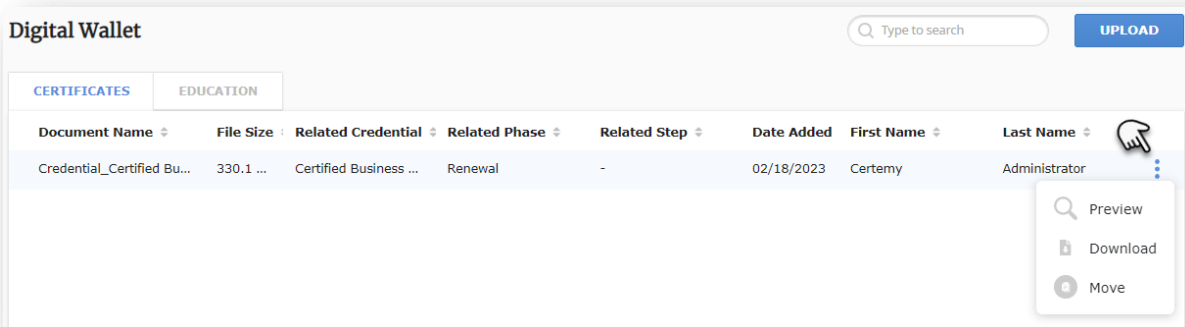


The move option allows you to move the file to another tab. Think of tabs as folders.



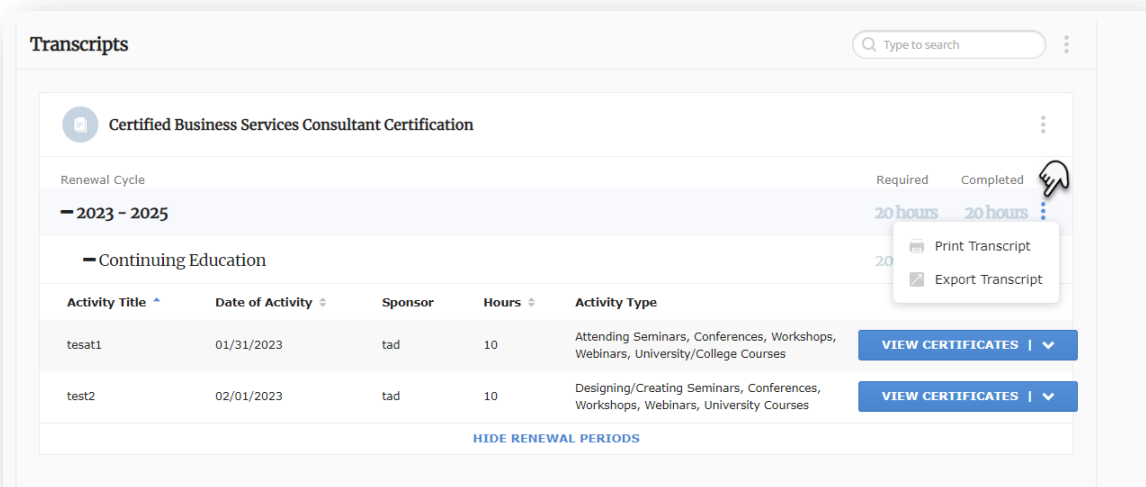
Keep in mind that every document or file in your Digital Wallet is visible to the instructor, so don't upload documents that are private or that contain sensitive information.

A new certificates tab is added once you have received your renewal certification certificate to include options to preview, download, or move the certificate.



Transcripts

At the top menu click the **Transcripts** button, to access digital transcripts that has been generated for you based on your continuing education step submissions. For example, your renewal certification transcript once all steps are completed. There are printing and exporting options available.

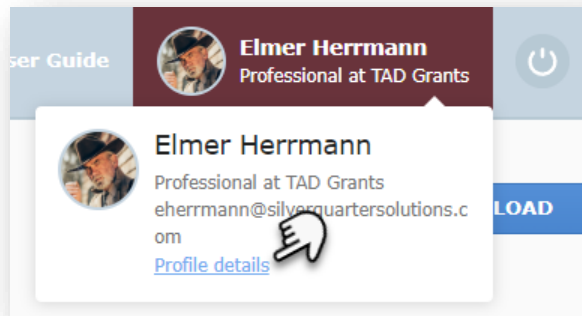


User Guide

Next to the right is the **User Guide** button, clicking this will take you to a library of tutorial videos that explains various parts of the platform used by TAD Grants.

Profile Details

Next, you will see your profile picture with your name and our organization name. Place your cursor over the profile picture and name to see the registered email address you use to log into the system.

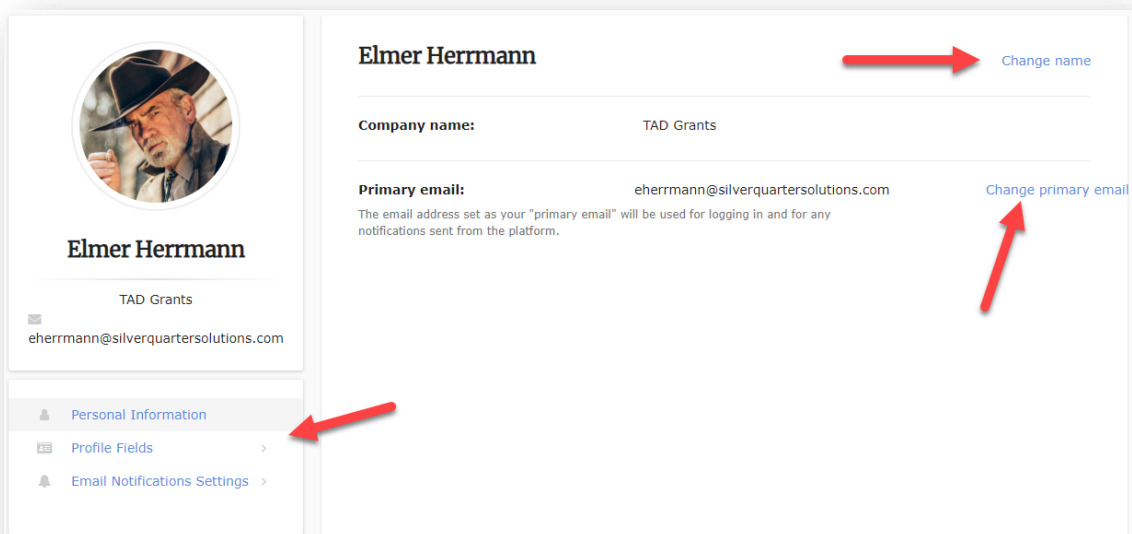


Click the **profile details** button to edit your personal information and profile information. Here you can change your personnel information and some settings. However, you may change your name from the screen, but you will have to provide an evidence document to support your request for a name change.

If you ever have to change your email address, simply click the **Change Primary Email** button.

Click **Profile Fields** to edit your profile details.

Lastly click the **Email Notification Settings** to review your system email settings and to opt in and opt out of certain emails. It is recommended that you remain opt in for all emails. You don't want to miss out on an important email reminding you to complete a task or advising you that you have successfully completed a credential.



Log Out

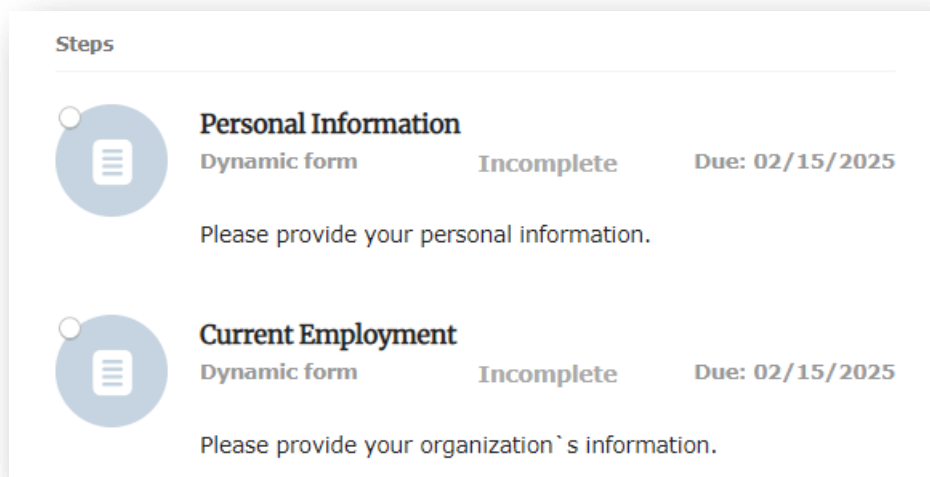
Next to the far right is the log out button. Click it to log out of the system and you'll be redirected to the user login screen.

Required Steps

Scroll down and view the required four steps you must complete.

Each step includes a status and due date.

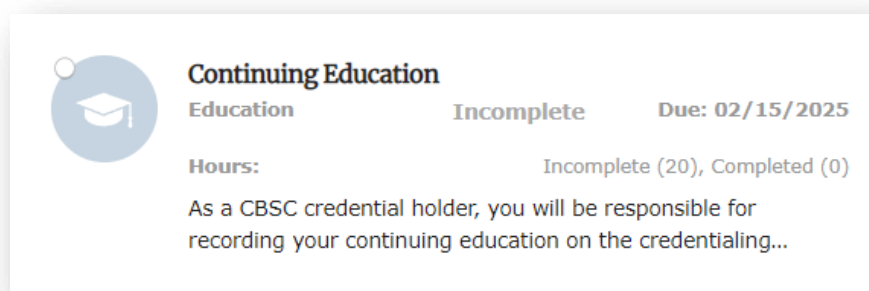
Starting with **Personal Information and Current Employment**, which is self-explanatory, and status will change to "Completed" after fulfilling the information required.



The screenshot shows a 'Steps' section with two items. Each item has a circular icon with a document symbol, a title, a subtitle, a status, and a due date. Below each item is a brief instruction.

Step	Status	Due Date
Personal Information Dynamic form	Incomplete	Due: 02/15/2025
Current Employment Dynamic form	Incomplete	Due: 02/15/2025

The **Continuing Education** step is where you are responsible for recording your education documents on the credentialing system. Record the activities that you attend for recertification of your CBSC Credential. The activities must occur within the two-year certification cycle at the renewal of your credential. You must **obtain 20 contact hours** during each two-year cycle. You will need to keep the system regularly updated in case you are randomly selected for an audit at your credential renewal time.



The screenshot shows a 'Continuing Education' step with a circular icon containing a graduation cap. It includes a title, subtitle, status, due date, and a section for 'Hours' with a breakdown of incomplete and completed hours. A brief instruction follows.

Step	Status	Due Date
Continuing Education Education	Incomplete	Due: 02/15/2025

Hours: Incomplete (20), Completed (0)

You must participate in continuing education activities that align with the CBSC. To decide if an activity aligns with the CBSC credential, you must be able to answer “yes” to each question below:

1. Instructor/facilitator must have formal education, expertise, or credentials in the relevant domain/competency areas aligned with your earned credential(s).
2. Does the content of the activity fall into one or more of the competencies defining the credential?

Helping Skills | Labor Market Information and Resources | Employability Skills | Program Management/Implementation | Promotion and Public Relations | Linkages and Promotion of the Workforce System | Business Engagement and Interaction | Engagement with Economic Development | Talent Pipeline Development

3. Is the activity intended for professionals in the career development field?
4. Will the activity be completed during my credentialing period?

If your course does not provide a Certificate of Completion, you must show proof of attendance (i.e., email confirmation, registration confirmation)

You may submit a document at any time during the two-year period by completing the submission form.

Submit Hours for the step

Activity type *

Hours *
 Value should be multiple of 0.01

Activity title *

Activity sponsor/ Provider *

Date when the activity was completed *

Upload credential file(s) (up to 30 MB) *
Browse"/>

SUBMIT

This step is a verification step which requires a review and approval performed by the instructor once you submit the required 20 hours.

The last submission completing the 20 hours requirement for this step will show the following:

WARNING

This submission will complete the requirements for this step. If you click "Continue" you will NOT be able to go back and edit any prior submissions. Are you sure you would like to continue?

02/18/2023 01:49 PM

Activity type: Attending Seminars, Conferences, Workshops, Webinars, University/College Courses

Hours: 10

Activity title: NAWDP Business Services webinar

Activity sponsor/provider: NAWDP

Date when the activity was completed: 02/02/2023

Uploaded credential files(s): Course 3 Career Advising Principles.doc

02/18/2023 01:48 PM

Activity type: Attending Seminars, Conferences, Workshops, Webinars, University/College Courses

Hours: 10

Activity title: WDCDC course

Activity sponsor/provider: TAD Grants

Date when the activity was completed: 01/31/2023

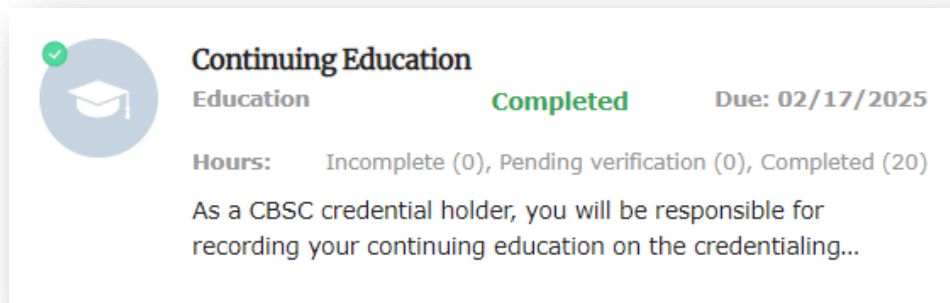
Uploaded credential files(s): [CMadvising.jpg](#)

[CANCEL](#) [CONTINUE](#)

If you click "Continue" you will NOT be able to go back and edit any prior submissions. You will only be able to add new submissions. Are you sure you would like to continue?

Click the **Continue** button to submit.

Once the instructor approves your documents, the Continuing Education step will show "Completed" and you may now submit renewal payment with the Renewal Fee step.

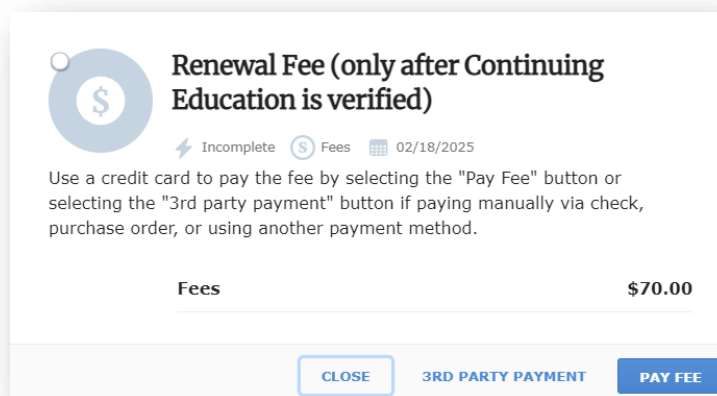


Continuing Education
Education **Completed** Due: 02/17/2025

Hours: Incomplete (0), Pending verification (0), Completed (20)

As a CBSC credential holder, you will be responsible for recording your continuing education on the credentialing...

Clicking the Renewal Fee step gives you two options for payment- Pay Fee or 3rd Party Payment.



Renewal Fee (only after Continuing Education is verified)

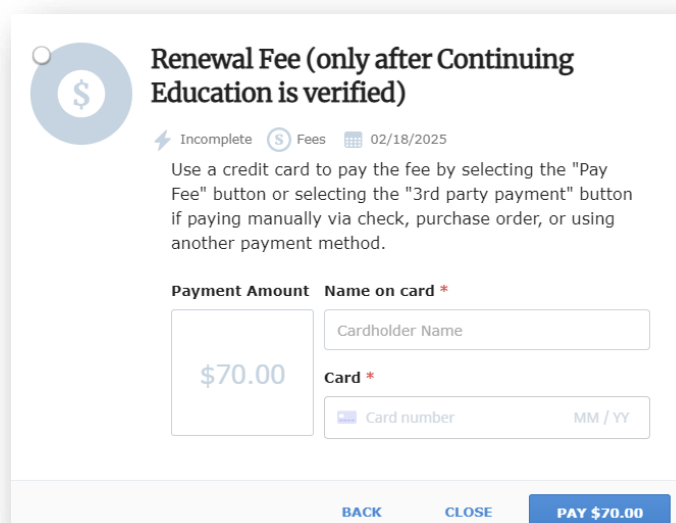
Incomplete Fees 02/18/2025

Use a credit card to pay the fee by selecting the "Pay Fee" button or selecting the "3rd party payment" button if paying manually via check, purchase order, or using another payment method.

Fees	\$70.00
------	---------

CLOSE 3RD PARTY PAYMENT PAY FEE

Use a credit card to pay the fee by selecting the "Pay Fee" button.



Renewal Fee (only after Continuing Education is verified)

Incomplete Fees 02/18/2025

Use a credit card to pay the fee by selecting the "Pay Fee" button or selecting the "3rd party payment" button if paying manually via check, purchase order, or using another payment method.

Payment Amount	Name on card *
\$70.00	<input type="text" value="Cardholder Name"/>
	Card *
	<input type="text" value="Card number"/> <input type="text" value="MM / YY"/>

BACK CLOSE PAY \$70.00

Select the "3rd party payment" button if paying manually via check, purchase order, or using another payment method. Provide payment and contact information in the comments section and a TAD Grants staff member will make contact regarding payment.

Payment by 3rd party

This option means that your company or a 3rd party will pay the fees.
Please provide comment on who will be submitting the payment.

Comment * :

BACK **CLOSE** **CONFIRM**

Once the payment is received, a renewal certificate will appear in your Digital Wallet and a transcript will be added to the Transcripts tab.



Submit any questions by email regarding these instructions to support@tadgrants.com.