

Accessing Certification with Okta Account

The Certification portal is a platform designed to serve the needs of the CSBS Certification program. The Certification portal facilitates all processes associated with the program, including certification applications, continuing education course approvals, course offering and completion reporting, and certification renewal.

Certification Portal User – Set up Okta account to access Certification Portal

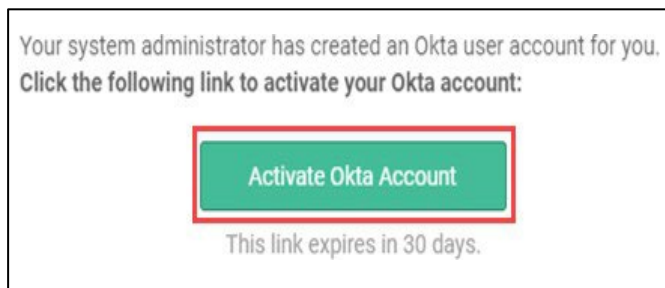
The Certification portal, along with other CSBS applications, can be accessed through a single sign on platform called Okta, using Symantec VIP for dual authentication. The following steps outline how to set up account with Okta and set up Symantec VIP to authenticate.

Note: To complete this process, you need to download and install [download and install Symantec VIP Access](#) on your mobile device or desktop. Do this now.

When initially set up as a new user, you are enrolled in Okta and an email is sent indicating that your Okta account is active.

Note: If you already had Okta access with previous CSBS applications, you simply need to access the Certification tile at <https://csbs.appiancloud.us/>.

1. Find the “Welcome to Okta” email from no-reply@sso.nmls.org.
2. Click **Activate Okta Account**.




Note: Your username is the email.

3. Create a new password, forgot password question and answer, and choose a security image. Click **Create My Account**.


Note: Your password must be at least 15 characters. Be sure to secure and maintain the password

4. Create your password, then click “Create My Account”

 Enter new password


Password requirements: at least 15 characters, a lowercase letter, an uppercase letter, no parts of your username, does not include your first name, does not include your last name. Your password cannot be any of your last 5 passwords. At least 1 day(s) must have elapsed since you last changed your password.

Repeat new password













 Choose a forgot password question

What is the food you least liked as a child? ▼

Answer

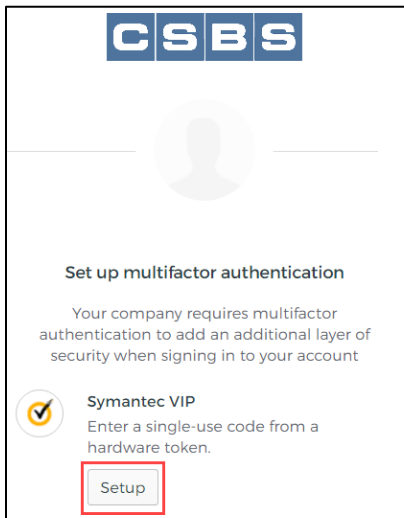
 Click a picture to choose a security image

Your security image gives you additional assurance that you are logging into Okta, and not a fraudulent website.

Create My Account

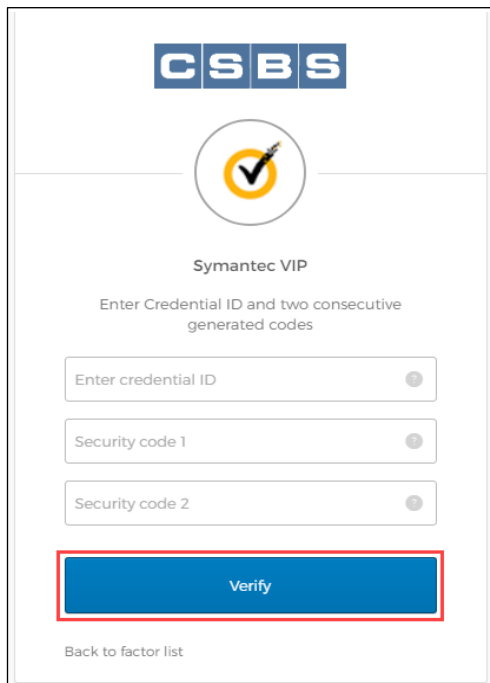
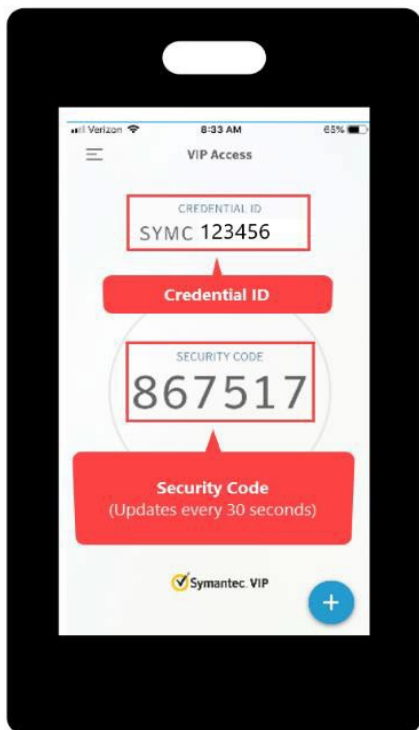
5. Click **Setup** to connect Symantec VIP.



- 6. **Open Symantec VIP** on your computer, mobile app, or view the token.

Note: The second Symantec Security Code will display after 30 seconds.

- 7. Type the **Credential ID** and **two sequential Security Codes** from Symantec VIP app.



- 8. Click **Verify** to continue.

Congratulations! You are now logged into Okta and can access Certification.

Log into Certification via Okta

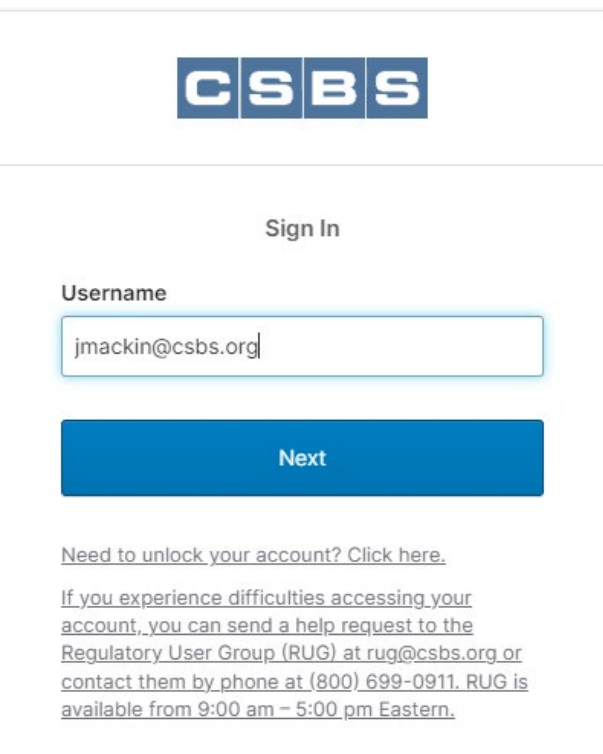
After you have created your Okta account and connected Symantec VIP, follow these steps to access Certification.

1. Go to <https://csbs.appiancloud.us/>
2. Click **Regulator**.



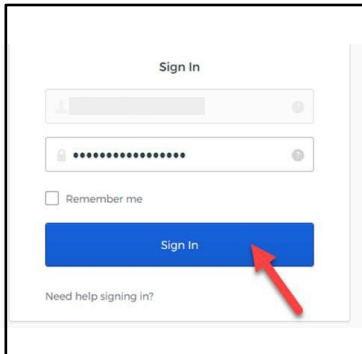
The screenshot shows the CSBS logo at the top. Below it, the text "What type of user are you?" is displayed. There are four options listed: "Regulator" (highlighted with a red box), "EMS (Okta Login)", "EMS (Prospective NMLS Course Provider)", and "Internal CSBS Staff".

3. Type your **Okta username**. Click **Next**.

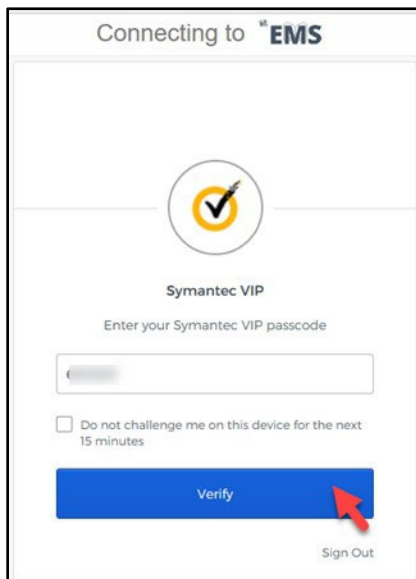


The screenshot shows the CSBS logo at the top. Below it, the text "Sign In" is displayed. There is a "Username" label above a text input field containing "jmackin@csbs.org". Below the input field is a blue "Next" button. At the bottom, there is a link: "Need to unlock your account? [Click here.](#)" and a paragraph: "If you experience difficulties accessing your account, you can send a help request to the Regulatory User Group (RUG) at rug@csbs.org or contact them by phone at (800) 699-0911. RUG is available from 9:00 am – 5:00 pm Eastern."

4. Type your **Okta password**. Click **Sign In**.



5. Open Symantec VIP on your mobile device, computer, or view the token. Type your Symantec VIP credential. Click **Verify**.



Congratulations! You are now logged into the Certification portal.

EXAMINER CERTIFICATION PROGRAM

Training Records Management



- View Transcript
- Apply for Certification
- ✓ Add Course Attendance
- Request Training

My Applications

All Draft Returned In Progress

Certification Type	Created	Last Modified	Status
BSA/VML Senior Specialist	9/24/2024 7:42 AM EDT	9/24/2024 7:47 AM EDT	Returned to Level 1 Approver
Associate Certified Information Systems Examiner	1/19/2021 2:31 PM EST	8/26/2024 1:16 PM EDT	Review Complete