



Managing Your BGC Public and Private Roster Information

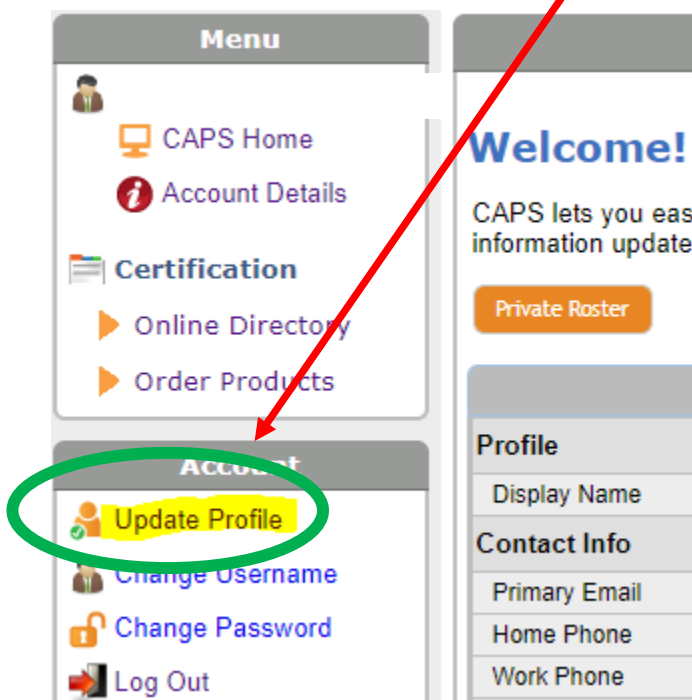
Overview: The Public and Private CIH rosters are now live! We have made several improvements in CAPS to give you full control over your privacy and what is (or is not) displayed, so please read this document carefully. The public roster is available [here](#); the private roster is available to CIHs in good standing through the Private Roster button in your [CAPS](#) profile.

Important: Step-by-step directions are provided on the following pages; however, here are some key points to remember:

- You must update your mailing address regularly for BGC to communicate with you about issues that impact your certification.
- You must give permission for any contact information to be shown on the Public or Private Rosters by setting your privacy attributes.
- If you want people to find you in a Consultant search, you must give permission through your privacy attributes.
- To share contact information in either the public or private rosters, you must put that information in your WORK ADDRESS and your PRIMARY EMAIL. Only fields containing text (not blank) will be shown, and you must give permission through your privacy attributes:
 - Company (in "Work Address")
 - Address (in "Work Address")
 - Phone (Use "Work Phone")
 - Email (Use "Primary Email")
- If you do not set your privacy attributes only your Name, Certification number, Status, Certification Date will be shown on the roster by default.
- Aside from confirming your certification status, **BGC will not share your information without your permission.**

Updating Your Profile and Setting Your Roster Preferences

1. Once you log into CAPS, click on the **Update Profile** link.



Clicking the **Update Profile** link displays a window similar to:

The screenshot shows the 'Update Profile Information' form. The form title is 'Update Profile Information' and it includes a note: 'The required fields are marked with *.' Below the title, there is a paragraph of text: 'Please keep your profile updated and complete in the event we must contact you about your credential(s). Information shown in grey can be changed by contacting BGC via email at info@GoBGC.org or by calling us at (517) 321-2638. When emailing, please indicate how you are currently listed, how you would like to be listed, and provide supporting documentation for the change (marriage certificate, etc.).' Below this text, there are 'Directions' and a 'Save' button. The form is divided into three tabs: 'Personal Information', 'Address', and 'Attributes'. The 'Personal Information' tab is active, and it contains a 'Name' field. The form is titled 'Update Individual Profile' and includes the identifier '#IND-17339'.

2. Click the **Attributes** tab to specify your privacy and communication preferences including whether you wish to display any contact information in the Public and Private Rosters. **Please remember that the only contact information that can be displayed on a roster search must be entered in the Work Address section of your profile** (see red arrow).

The screenshot shows a user profile interface with three tabs: 'Personal Information', 'Address', and 'Attributes'. The 'Attributes' tab is active and highlighted in yellow. A red arrow points to the 'Address' tab. Below the tabs is a section titled 'Privacy and Communication Options' with the following text: 'The options below regulate what displays in a roster search based on the information in your WORK ADDRESS fields (accessed via the Address tab above). Information from your Home or Mailing address **will not** be displayed. **Note:** If you select "Consultant", please also select the Public and/or Private option, otherwise your contact information will not be displayed. Click **Save** when complete to store the information to your profile.'

Below this text are four checkboxes:

- Please display my name and contact information for **Consultant searches** (i.e., **Consultant**)
- Please display my Work Address information on the Public Roster (i.e., **Public**)
- Please display my Work Address information on the Private Roster (i.e., **Private**)
- I prefer not to receive commercial mailings (i.e., **Promotions**)

At the bottom right of the form are three buttons: 'Prev', 'Next', and 'Save'.

3. Click the **Address** tab to you update mailing, work, and home addresses:

- Mailing Address is used for communicating with BGC staff, and (when your permission is given) sending mailings such as conference announcements that may be of interest to you for your work.
- Work Address is used as an alternate address for contacting you, if you cannot be reached through another address, and (when your permission is given) for displaying information in the Public and Private rosters.
- Home Address is used as an alternate address for contacting you, if you cannot be reached through another address.

Personal Information | **Address** | Attributes

Mailing Address

Important Note: Your "Mailing Address" is where all printed correspondence will be sent. Please be sure to update it when necessary.

Country-Mailing: USA ▼

Company:

Address Line 1: Street / PO Box

Address Line 2: Suite / Apt# / Floor

City/Town:

State/Province: ▼

Zip/Postal Code:

Work Address

Important Note: Your "Work Address" is the information that will or will not be displayed during a roster search (depending on your preferences in the Attributes tab). Please be sure to update it when necessary.

Copy from Mailing Address ▼ | Copy to Mailing Address ▲

Country-Work: CHINA ▼

Company:

Home Address

Note: Information entered here is for BGC's use only. It will not be shared in any manner.

Copy from Mailing Address ▼ | Copy to Mailing Address ▲

Country-Home: USA ▼

Address Line 1:

Address Line 2:

4. Check the rosters to make sure that your changes are displaying as you intended. The public roster is available [here](#). The private roster is available to CIHs in good standing through the Private Roster button in their [CAPS](#) profile as shown below:

Welcome!

CAPS lets you easily and safely apply for a new BGC CIH certification or manage a current CIH certification. Be sure to keep your information updated. This allows us to reach you with information about your account and/or updates to BGC and its credentials.

CURRENT DIPLOMATES:

- Visit the **ACCOUNT DETAILS** link to your left for the answers to many of your questions: Application history, payment history, CE info, certification information, emails sent to you, and more.
- See the **RECERTIFICATION** section below to Report/Manage Points or to select Voluntary Surrender or Retirement options.
- See the **CERTIFICATION INFORMATION** section below to print a copy of your certification or to see details on your certification cycle.

APPLICANTS and REAPPLICANTS:

- Click on the Apply for Certification button below to Start or Resume an application.

[Private Roster](#)

Showing Contact (Work) Information in a Roster:

If you set your privacy attributes to show contact information (from your work address), a roster search will be shown as below. Remember, only the fields that you populate with data will be displayed. So, if you don't provide an email address for work, the "Email:" line will not be shown.

Certificants	
Records matching your search criteria: 1	
Search Result	Certification
Name: Tracey Doe Company: Infinitely Great IH Consulting, Inc. Address: 5151 CIH Road Philadelphia, PA 19104 Phone: (555) 123-1234 Email: ✉	CIH-CP 0000, Active, Cert Date: May 30, 2014

Default Information in a Roster:

If you DID NOT set your privacy attributes to show information in a roster, only your Name, Certification number, Status, and Certification date will be shown, by default.

Certificants	
Records matching your search criteria: 1	
Search Result	Certification
Name: Tracey Doe	CIH-CP 0000, Active, Cert Date: May 30, 2014

IMPORTANT REMINDER:

Aside from confirming your certification status, **BGC will not share your information without your permission.**