



Membership Billing Portal User Guide

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Introduction

This document outlines the CISI Membership Billing Portal.

How to access the Membership Billing Portal

The CISI will set up your login for you to access the Billing Portal. If you have not already received this, please email firmbilling@cisi.org or contact your Client Relationship Manager. You can access the Billing Portal at: www.cisi.org/cisiweb2/cisi-website/misc-pages/login-portal

Screen Layout

Upon accessing the system you will be presented with the main management screen. It is important to familiarize yourself with the components and how to interact with the features.

membership Number	Membership Category	Renewal Membership	FCA Reference	Department	Cost Code	Title	Last Name	First Name	Membership End Date	Has UK SPS	Pays For Membership Renewal	Pays For UK SPS Renewal	Pays for IOM SPS Renewal	Pays for GSY SPS Renewal	Left Firm Remove	Renewal/Upgrade Fee Outstanding
	Qualifications					Mr			31 Mar 2025	No	✓				Remove	0.00
	Membership					Miss			31 Mar 2025	No	✓				Remove	0.00
	HR					Mrs			31 Mar 2025	No	✓				Remove	0.00
	Publications					Mrs			31 Mar 2025	No	✓				Remove	0.00
	Business Development					Mr			31 Mar 2025	No	✓				Remove	0.00
	IT					Mr			31 Mar 2025	No	✓				Remove	0.00
	Operations					Mr			31 Mar 2025	No	✓				Remove	0.00
	Qualifications					Mr			31 Mar 2025	No	✓				Remove	0.00
	Member Services					Mr			31 Mar 2025	No	✓				Remove	0.00
	Publications					Mr			31 Mar 2025	No	✓				Remove	0.00
	Publications					Mrs			31 Mar 2025	No	✓				Remove	0.00
	Operations					Mr			31 Mar 2025	No	✓				Remove	0.00
	Marketing & Communications					Mr			31 Mar 2025	No	✓				Remove	0.00
	Marketing & Communications					Mr			31 Mar 2025	No	✓				Remove	0.00
	Marketing & Communications					Ms			31 Mar 2025	No	✓				Remove	0.00
	Financial Planning					Mrs			31 Mar 2025	No	✓				Remove	0.00
	Marketing & Communications					Mr			31 Mar 2025	No	✓				Remove	0.00
	Qualifications					Mr			31 Mar 2025	No	✓				Remove	0.00
	Qualifications					Mrs			31 Mar 2025	No	✓				Remove	0.00
	Secretariat					Miss			31 Mar 2025	No	✓				Remove	0.00

Account being viewed

At the top of the screen you will see your name and the name of the firm that you are viewing.

CISI Membership Billing | Logged in Tyler Huckle | Chartered Institute for Securities & Investment

Outstanding Summary

To the top right of the screen you have the Outstanding Summary – this details any membership fees that are outstanding for the entire list of members you are viewing. If there is a value outstanding a button will be available to process the fees. This window can be switched on / off using the toolbar.

Outstanding Summary	
Membership Renewal Fee	0.00
SPS Renewal Fee	0.00
CFP Renewal Fee	0.00
IOM SPS Renewal Fee	0.00
Guernsey SPS Renewal Fee	0.00
Sub Total	0.00
VAT	0.00
Total	0.00

Renewal Summary

The Renewal Summary sits at the bottom of the screen and gives an overall view regarding the entire member list of the organisation and their current membership status. These sections are clickable to filter the list for that category. This window can be toggled on / off using the toolbar.



Quick Links

Across the top of the window you will see a list of all the Organisation IDs within the invoicing structure along with an All Organisations link, these are available to filter the list with just members from that organisation.

Quick Links: [All Organisations](#) | 2157

If you hover over each link it will also tell you how many employees are listed for that organisation.

Quick Links: All Organisations 2157		
Membership Number	Membership Category	FC/Refere 147 employees

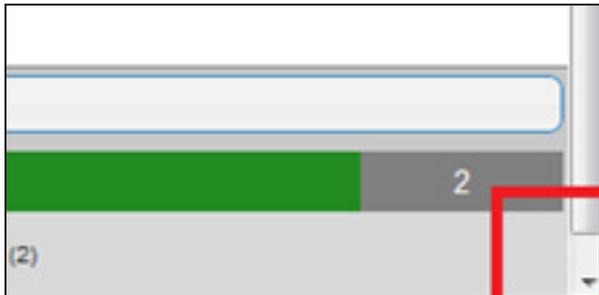
Sorting Data

Most of the columns are clickable to sort the data as desired.

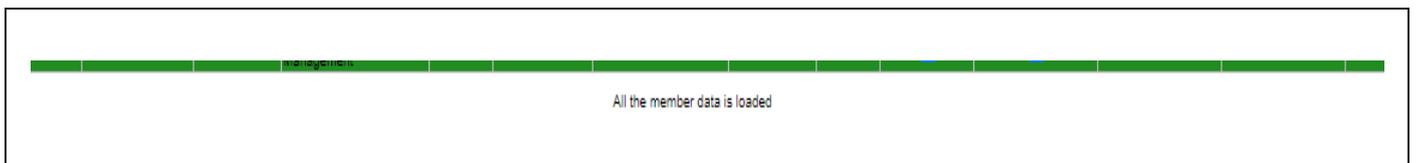
Membership Number	Membership Category	FCA Reference	Department	Title	Last Name	First Name	Membership End Date	Has SPS	Pays For Membership Renewal	Pays For SPS Renewal	Left Firm Remove	Renewal Fee Outstanding	Renewal Stat
-------------------	---------------------	---------------	------------	-------	-----------	------------	---------------------	---------	-----------------------------	----------------------	------------------	-------------------------	--------------

Loading Data

By design the data is loaded by a vertical scrolling method. When initially loaded the data will load to fit your screen vertically, to request more data simply scroll down the page and the data will load.



When all of the data available has been loaded a message will be displayed.



Quick Find

To the top right of the window there is a Quick Find facility that allows a search against most of the fields displayed. Simply enter the details and click the tick button – to reset your filter click the cross button.

Find:

Click here to view your firm's Upgrades												
Find: <input type="text"/> <input checked="" type="checkbox"/> <input type="checkbox"/>												
31 Mar 2023	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Renewal	0.00	0.00	Renewal not due			
31 Mar 2023	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Renewal	0.00	0.00	Renewal not due			
31 Mar 2023	No	<input checked="" type="checkbox"/>				Renewal	0.00	0.00	Renewal not due			
31 Mar 2023	No	<input checked="" type="checkbox"/>				Renewal	0.00	0.00	Renewal not due			
31 Mar 2023	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Renewal	0.00	0.00	Renewal not due			
31 Mar 2023	Yes	<input checked="" type="checkbox"/>				Renewal	0.00	0.00	Renewal not due			
31 Mar 2023	No	<input checked="" type="checkbox"/>				Renewal	0.00	0.00	Renewal not due			
31 Mar 2023	No	<input checked="" type="checkbox"/>				Renewal	0.00	0.00	Renewal not due			
31 Mar 2023	No	<input checked="" type="checkbox"/>				Renewal	0.00	0.00	Renewal not due			

Outstanding Summary

Membership Renewal Fee	0.00
SPS Renewal Fee	0.00
CFP Renewal Fee	0.00
IOM SPS Renewal Fee	0.00
Guernsey SPS Renewal Fee	0.00
Sub Total	0.00
VAT	0.00
Total	0.00

Toolbar

The toolbar is available within the top right of the window and contains the following functions:



Advanced Find; provides more precise and combined find options



Settings; access and change your settings
(see page 13 for further details)



Download Members CSV; download a complete list of members within the structure
(see page 14 for further details)



My Membership Invoices; view and cancel requests to generate invoices
(see page 12 for further details)



Switch the Renewal Summary window on / off



Switch the Outstanding Summary window on / off



Logout

Assistant

Throughout the system there are several Assistant popup windows – these provide details about what you are doing and the impact they have.

It is suggested these are left on until you are familiar with the system and they can be switch on and off through the Settings function.

Making changes to Members Billing Records

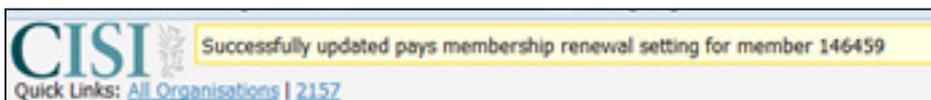
There are three member management change features: that can be done through the main members list.

1. Pays Membership Renewal; if the organisation is paying for the member's membership renewal fee this will be indicated through the checkbox in the column provided. You can untick the checkbox if you do not wish to continue paying the fees.
If this checkbox is not available the person's previous membership has expired (Red), renewal is no longer available you should contact CISI immediately.
2. Pays SPS Renewal; if the organisation is paying for the member's SPS renewal fee this will be indicated through the checkbox in the column provided.
To pay for an SPS renewal the organisation must also be paying for the person's membership and they must have an existing SPS to renew – as indicated through the 'Has SPS' column. You can untick the checkbox if you do not wish to continue paying the fees.
3. Person has left; if the person no longer works for the organisation they can be removed by clicking the Remove link. For details on this process read – Employee Removal.

No	<input type="checkbox"/>		Remove	0.00	Pays own membership
No	<input checked="" type="checkbox"/>		Remove	195.00	To be renewed
Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove	195.00	To be renewed
Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove	195.00	To be renewed
No	<input checked="" type="checkbox"/>		Remove	0.00	Renewal not due
Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove	195.00	To be renewed
Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove	175.00	To be renewed
Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove	175.00	To be renewed
Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove	125.00	To be renewed
Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove	175.00	To be renewed

When changes are made they will be successfully indicated as shown below, the Renewal Summary and Outstanding Summary window will also have their content refreshed automatically.

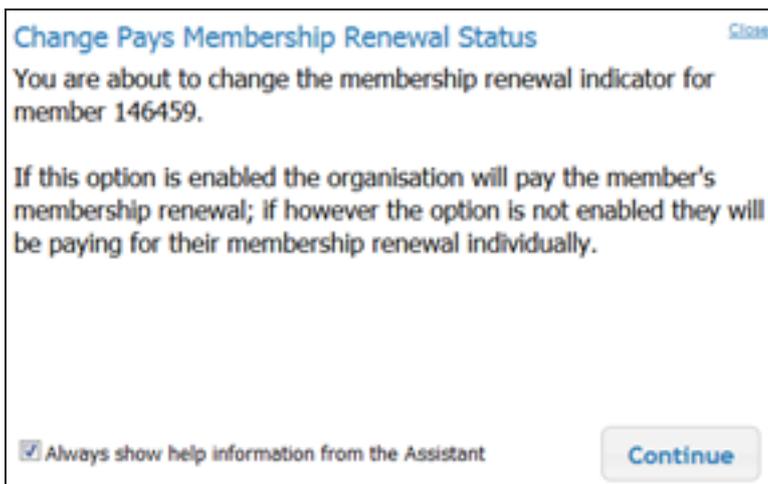
The person will also reload within the grid and the new status will be shown along with the colour indicator and the renewal fee outstanding.



Changing Membership Renewal Status

To change this setting click on the checkbox to either turn it on (organisation pays) or off (the person will be paying individually).

If you have the Assistant on for this function, the pop-up below will be displayed.



If at any point you want to turn off the Assistant for that section, you can do so by un-checking the option to the bottom left of the window and confirming. This can be turned on at a later point through the Settings function.

It is recommended you leave the Assistant on until you are comfortable with CISI Membership Billing.

Are you sure you want to turn the Assistant off now?

The data update is done immediately and indicated successfully at the top of the window with the Renewal Summary and Outstanding Summary instantly reflecting your changes.



Quick Links: [All Organisations](#) | [2157](#)

Successfully updated pays membership renewal setting for member 146459

Changing SPS renewal status

To change this setting click on the checkbox to either turn it on (organisation pays) or off (the person will be paying individually).

If you have the Assistant on for this function, this will be displayed.

Change Pays SPS Renewal Status [Close](#)

You are about to change the SPS renewal indicator for member 126447

You must pay for the membership renewal to be able to pay for SPS and receive the discount.

Always show help information from the Assistant

Remove employee

If a person no longer works for an organisation they can be removed by clicking the Remove link within that person's row in the grid.

A leaving date must be selected and a Note can be optionally provided.

Remove Member

Member _____ will be removed from your portal and the firm will not be billed for the membership subscription.

Please ensure that the member is informed.

If you have removed a member in error, please contact firmbilling@cisi.org to have them added back to the portal.

Leaving Date:

Notes (optional):

Leaving Date:

Notes (optional):

December 2013

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	30	31				

Submit for payment

Once you have selected all the members that your organisation are paying membership and SPS renewals for, you can click the '**Submit for Payment**' button within the Outstanding Summary box.

When clicking this button a proforma invoice will be displayed in PDF format and is available to print and download. **When the document has been reviewed and is correct this can be confirmed by clicking the – 'Confirm Submit for Payment' button.**

Submit for Payment Close

Review your outstanding membership to be renewed, print, download the preview. When you are happy with the content confirm to raise an invoice

Page: 1 of 29 Automatic Zoom

Net Amount:	70,255.00
VAT:	984.00
Total Due:	71,239.00

VAT Analysis:	Exempt	Zero Rated	Standard
	65,335.00	0.00	4,920.00

For the latest Chartered Institute for Securities & Investment news and information visit our website at www.cisi.org

Payment to be made by electronic transfer to:

Sort Code: 12 20 29. Bank of Scotland Account Number: 06081530BIC Code: BOFS GB 21281. IBAN: GB51 BOFS 1220 2906 0815 30. Please quote our invoice number on all remittance advices.

To pay by credit card please contact mandy.aujla@cisi.org 0207645 0681. Payment terms: 14 days from invoice date.

[Confirm Submit for Payment](#)

Once you have confirmed the payment, the following message is displayed with the facility to input a Purchase Order Number for the invoice if required.

Submit for Payment Close

Please be aware that once submitted, any withdrawals will be reimbursed by credit note and any additions will be invoiced separately.

Are you sure you are ready to submit your list for invoicing now?

Purchase Order Number (optional)

[YES, Confirm Submit for Payment](#)

Membership Applications and Upgrades

Initial invitation

Individuals who complete a relevant CISI qualification, record Continuing Professional Development (CPD) hours or pass the IntegrityMatters test, become eligible to apply for, or upgrade their membership of, the CISI. If anyone from your firm becomes eligible to join as a member or upgrade to a higher level of membership they will receive an email to notify them of this. An example of this shown below.

Dear {CandidateSalutation},

Congratulations on achieving the Chartered Institute for Securities & Investment {AwardName}. Now you have completed the programme, I am delighted to inform you that you are immediately eligible for {MembershipGrade} membership of the CISI. This is the first step to becoming an individually chartered member.

The CISI is the leading examining, training and membership body for professionals in the securities and investment industry. CISI membership carries with it prestige and esteem, and boasts a comprehensive professional benefits scheme to assist you throughout your career. In addition to the designatory letters {DesignationLetters}, members benefit from exclusive networking, development and progression opportunities, all tailored to give them the knowledge, skills and network to excel and demonstrate their professionalism.

These opportunities are now available to you, you can apply quickly and easily using our online application form - simply:

1. Log in to [MyCISI](#)
2. Complete your online application form
3. Once your application is accepted, your membership certificate and card will be dispatched

If you have any questions about CISI membership, you can find out more at cisi.org/membership or contact our customer support team at customersupport@cisi.org or call on +44 20 7645 0777.

Yours sincerely

Simon Culhane, Chartered FCSI
Chief Executive
Chartered Institute for Securities & Investment

Completing the application

If the candidate chooses to join/upgrade they will need to complete an online application form. When completing the online form they will be given the option to pay themselves or to request that their firm pays.

Contacting the portal holder

Request for firm to pay for new membership or upgrade – portal holder notification

If a candidate requests that their firm pays for their new membership or membership upgrade, an email will be sent to you, as the portal holder, advising you that their new membership application or upgrade is awaiting authorization for payment. An example of this email is below.

Dear {CandidateSalutation},

A member of your team, {CandidateName}, has completed the Chartered Institute for Securities & Investment {AwardName}. This makes them eligible for {MembershipGrade} membership.

They have applied for this and confirmed that your firm will pay for their membership.

To authorise this:

1. Log in to your billing portal
2. Authorise the payment against the individual's name

If you have any queries about this membership application, please contact our customer support team at customersupport@cisi.org or call +44 20 7645 0777.

Yours sincerely

CISI Membership
Chartered Institute for Securities & Investment

Confirm payment

To pay for the individual you will need to log into your billing portal and view the upgrade summary.

CISI Membership Billing Online

Please log in below to manage your CISI Members' Membership

Login to your account

Email Address / Customer Number

Password

Remember me next time.

[Forgot your password?](#) | [Not registered? Sign up here](#)

Log In



Once you have clicked through into your billing portal you can select your firm's upgrades.

Chartered Institute for Securities & Investment [Click here to view your firm's Upgrades](#)

nt	Title	Last Name	First Name	Membership End Date	Has UK SPS	Membership Renewal	Pays For UK SPS Renewal	Pays for IOM SPS Renewal	Pays for GSY SPS Renewal	Left Firm Remove	Renewal/Upgrade Fee Outstanding	CFP

You can then choose to pay the upgrades by clicking submit for payment. Once you have submitted for payment an invoice will generate overnight.

[Click here to view your firm's Renewals](#)

Find: ✓ ✗

First Name	Membership End Date	Left Firm Remove	Renewal/Upgrade Fee Outstanding	Renewal Status
Joseph	18 Jun 2014	Remove	175.00	New Member

member data is loaded

Outstanding Summary

Upgrades available	175.00
Sub Total	175.00
VAT	0.00
Total	175.00

[Submit for Payment](#)

Declining Payment

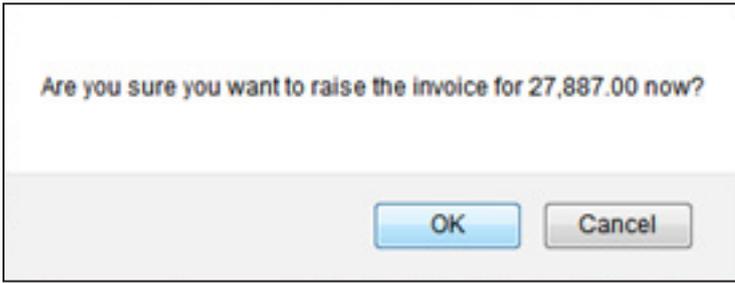
If you do not wish to pay for the individual's upgrade you can click on the decline payment option. They will then receive an email advising them that their firm has declined to pay and they will need to pay by an alternative method.

Left Firm Remove	Renewal/Upgrade Fee Outstanding	Renewal Status	Upgrade Available
Remove	175.00	New Member	Decline and send individual payment request email

If you have any queries about this process or would like more information please contact your CISI Client Relationship Manager or phone Customer Support on **+44 20 7645 0777**.

My Membership Invoices

After a final confirmation the invoice is generated as the preview document.



If you have the Assistant on for this function, the below message will be displayed.

What happens next? [Close](#)

Now you have confirmed the membership content is correct using the invoice preview provided:

- A real invoice will be generated and delivered to you for payment
- Your members will have their membership renewed.

If you want to cancel this order you can do so by selecting *'My Membership Invoices'* from the top right of the main page until close of business today.

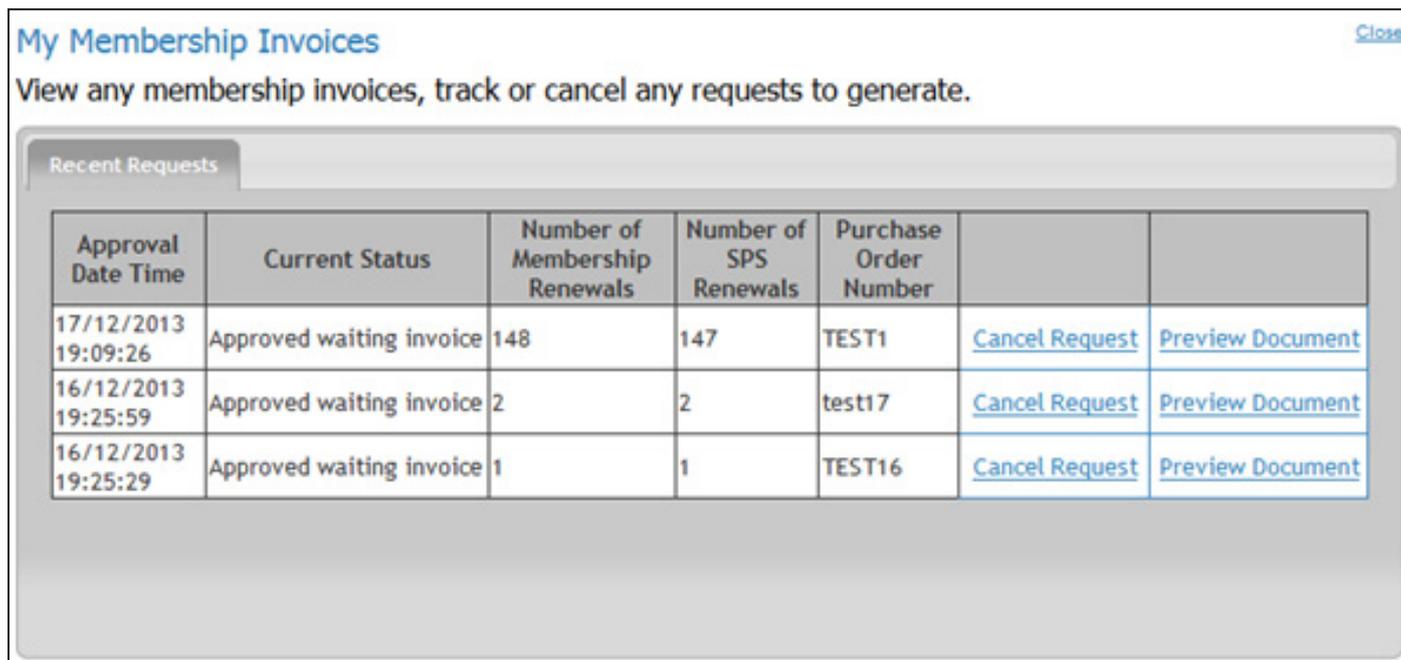
Always show help information from the Assistant

Within the members list – members will now have an “Approved” indicator and the checkboxes and removal link to change their options is now unavailable. This will appear like this until the invoice is generated which is done at the end of each working day. This allows you until close of business to cancel your request to generate the invoice. Once the invoice is generated the members will be automatically renewed.

\$				0.00	To be renewed (Approved)
\$				0.00	To be renewed (Approved)
\$			Remove	0.00	Membership expired
\$	<input type="checkbox"/>		Remove	0.00	Pays own membership
\$				0.00	To be renewed (Approved)
\$				0.00	To be renewed (Approved)
\$				0.00	To be renewed (Approved)
\$				0.00	To be renewed (Approved)
\$				0.00	To be renewed (Approved)
\$				0.00	To be renewed (Approved)
\$				0.00	To be renewed (Approved)

The 'My Membership Manager' invoice section is accessible via the toolbar button and allows firms to view the invoices previously approved and also allows you to cancel any of those requests if the invoice has not yet been generated.

The *My Membership Invoices* is accessible via the toolbar button.



My Membership Invoices [Close](#)

View any membership invoices, track or cancel any requests to generate.

Recent Requests

Approval Date Time	Current Status	Number of Membership Renewals	Number of SPS Renewals	Purchase Order Number		
17/12/2013 19:09:26	Approved waiting invoice	148	147	TEST1	Cancel Request	Preview Document
16/12/2013 19:25:59	Approved waiting invoice	2	2	test17	Cancel Request	Preview Document
16/12/2013 19:25:29	Approved waiting invoice	1	1	TEST16	Cancel Request	Preview Document

For each approval the original Proforma invoice that was provided is also available – this is the exact document that was produced at the time, this is not regenerated.



Page: 1 of 29 Automatic Zoom

Net Amount:	70,255.00
VAT:	984.00
Total Due:	71,239.00

VAT Analysis: Exempt Zero Rated Standard
65,335.00 0.00 4,920.00

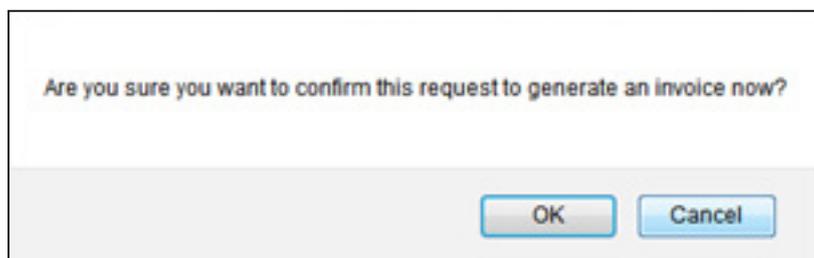
For the latest Chartered Institute for Securities & Investment news and information visit our website at www.cisi.org

Payment to be made by electronic transfer to:
Sort Code: 12 20 29. Bank of Scotland Account Number: 06081530BIC Code: BOFS GB 21281. IBAN: G851 BOFS 1220 2906 0815 30 Please quote our invoice number on all remittance advices.

To pay by credit card please contact mandy.asjla@cisi.org 0207645 0681. Payment terms: 14 days from invoice date.

Cancelling a request to generate an invoice

To cancel an invoice already approved, simply click the Cancel Request link. Once you have confirmed the cancellation the renewal statuses of members and the Outstanding Summary will instantly be reflected.



Are you sure you want to confirm this request to generate an invoice now?

Settings

Your Settings can be accessed through the toolbar.

You can amend the columns that are displayed within the member list as desired.

Column Picker

Settings

[Close](#)

Adjust your viewing preferences and settings on your account

Column Picker Invoice Options Assistant

You can choose specific columns to view by ticking or unticking the boxes accordingly:

Membership Number	<input checked="" type="checkbox"/>
Membership Category	<input checked="" type="checkbox"/>
FCA Reference	<input checked="" type="checkbox"/>
Department	<input checked="" type="checkbox"/>
Cost Code Column	<input checked="" type="checkbox"/>
Title	<input checked="" type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>
First Name	<input checked="" type="checkbox"/>
Membership End Date	<input checked="" type="checkbox"/>
Has SPS	<input checked="" type="checkbox"/>
Renewal Status	<input checked="" type="checkbox"/>
Decline payment	<input type="checkbox"/>

Save Settings

Invoice Options

Your invoicing presentation options can be set. Here you can set your invoicing presentation options, i.e, by branch or department

Settings

[Close](#)

Adjust your viewing preferences and settings on your account

Column Picker Invoice Options Assistant

I would like my Billing Portal invoices to be sorted by Branch

I would like my Invoice Schedules to be split on new values

Save Settings

Assistant

The various assistant options can be switched on / off.

Settings

[Close](#)

Adjust your viewing preferences and settings on your account

Column Picker	Invoice Options	Assistant
The following Assistants are available to guide you, feel free to toggle them off as you become family with CISI Membership Billing.		
Change Membership renewal	<input checked="" type="checkbox"/>	
Change SPS renewal	<input checked="" type="checkbox"/>	
Change IOM SPS renewal	<input checked="" type="checkbox"/>	
Change GSY SPS renewal	<input checked="" type="checkbox"/>	
Payment submitted	<input checked="" type="checkbox"/>	

Download members

The complete list of members is available for download through the toolbar button.



Outstanding Summary

Upgrades available	0.00
Sub Total	0.00
VAT	0.00
Total	0.00

Are you sure you want to download a complete list of your current members in CSV format now?

The download is in CSV format and contains the data as displayed below.

	A	B	C	D	E	F	G	H	I	J
1	Membership Number	Membership Category	FCA Reference	Department	Title	Last Name	First Name	Membership End Date	Has SPS	Pays F
2	9	Fellow			Mr	Al	S	31-Mar-14	No	Yes
3	9	Chartered Fellow			Mr	Al	F	31-Mar-14	No	Yes
4	9	Chartered Hon Fellow			Mr	Cl	S	01-Jan-00	No	Yes
5	1	Member			Mr	Ta	S	31-Mar-14	No	Yes
6	7	Chartered Hon Fellow			Mr	Ya	A	01-Jan-00	No	Yes
7	9	Associate			Ms	Hi	C	31-Mar-14	No	Yes
8	3	Chartered Fellow			Miss	Li	S	31-Mar-13	No	No
9	2	Chartered Fellow		Membership	Miss	Pr	C	31-Mar-14	No	Yes
10	9	Affiliate			Mrs	Di	K	31-Mar-14	No	Yes
11	4	Affiliate			Mrs	W	C	31-Mar-14	No	Yes
12	0	Chartered Member			Mr	M	K	31-Mar-14	No	Yes
13	4	Affiliate		4th floor	Mr	Di	C	31-Mar-14	No	Yes
14	8	Affiliate			Mrs	St	S	31-Mar-14	No	Yes
15	3	Associate	1234		Mr	Be	F	31-Mar-15	No	Yes
16	9	Affiliate			Ms	Ni	A	31-Mar-14	No	Yes
17	5	Chartered Fellow			Mr	M	A	31-Mar-14	No	Yes
18	6	Member			Mr	Li	C	31-Mar-14	No	Yes
19	1	Affiliate			Mr	M	F	31-Mar-14	No	Yes
20	2	Affiliate		Finance	Ms	Hi	C	31-Mar-14	No	Yes
21	7	Affiliate		Secretariat	Miss	Ri	L	31-Mar-14	No	No
22	7	Affiliate			Mr	Hi	A	31-Mar-14	No	Yes
23	1	Affiliate			Mr	Hi	A	31-Mar-14	No	Yes
24	9	Affiliate			Mrs	W	C	31-Mar-14	No	Yes
25	8	Affiliate			Mr	Gi	M	31-Mar-14	No	Yes

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 [cisi.org](https://www.cisi.org)

 +44 20 7645 0777

 customersupport@cisi.org

 @cisi

 [cisi.org/linkedin](https://www.linkedin.com/company/cisi)

 @the_cisi

 [cisi.org/youtube](https://www.youtube.com/c/cisi)