

Executive Summary

The UNEP FI Portal (the Portal) is a self-service platform that allows UNEP FI members to view and manage their institution's profile and engagement information, to manage contacts directly and sign up for activities and programs.

Access and Functionalities

The Portal is accessible through the [UNEP FI Members Area](#) or directly at this link [here](#), allowing members to:

- **View your institution's profile and engagement**
- **View and request to join activities**
- **Manage contacts' information**
- **Manage your communication preferences.**

By accessing these resources through one integrated location, you can streamline your experience, stay organized, and engage more effectively with the resources and opportunities available.

Staff from all UNEP FI members with a valid institutional address can register to use the Portal.

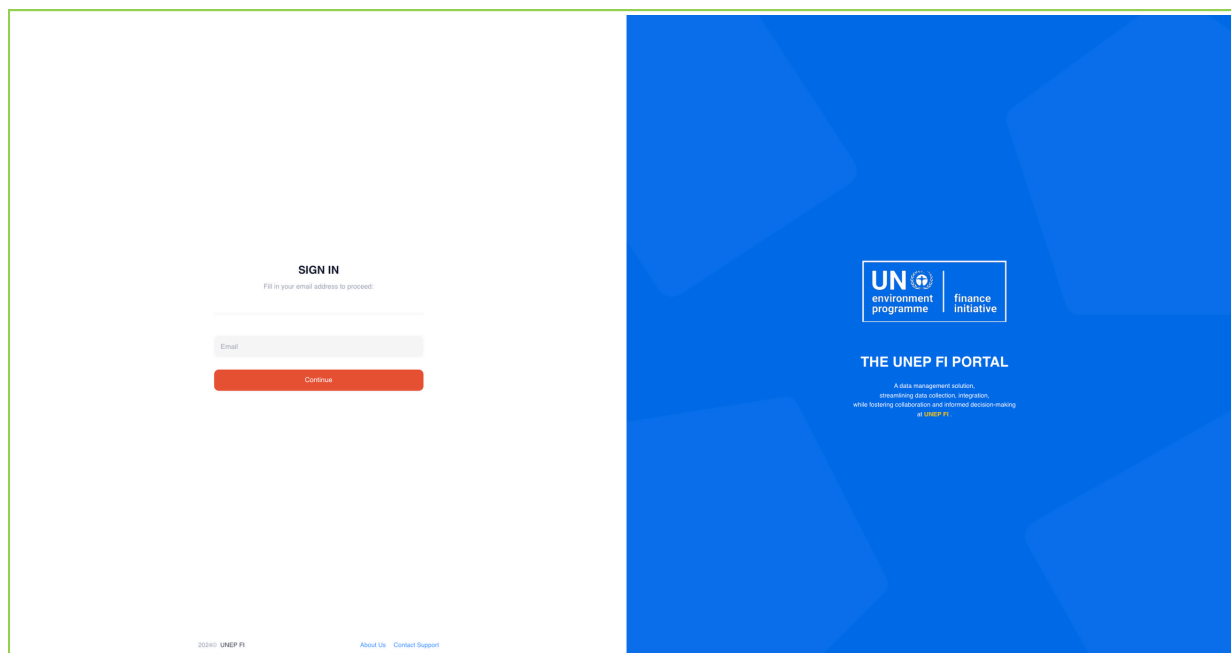
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Getting started: Registration, Activation and First Log in

You can access the UNEP FI Portal through the Members' area of UNEP FI website ([link](#)) or directly at the following link: <https://portal.unepfi.org/>



The screenshot shows the 'SIGN IN' page of the UNEP FI Portal. On the left, there is a white box with the heading 'SIGN IN' and the instruction 'Fill in your email address to proceed:'. Below this is an 'Email' input field and a red 'Continue' button. At the bottom of the white box, it says '©2020 UNEP FI' and 'About Us Contact Support'. On the right, there is a blue background with the UNEP FI logo (UN environment programme | finance initiative) and the text 'THE UNEP FI PORTAL'. Below the logo, it says 'A data management solution, streamlining data collection, integration, while fostering collaboration and informed decision-making at UNEP FI.'

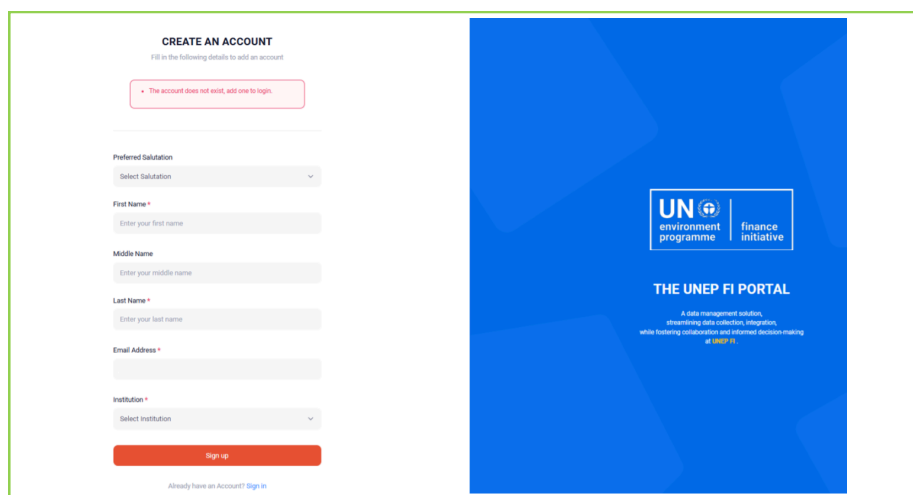
Fill in your institutional email address in the field provided.

If you are an existing user, you will be prompted to fill in your password. If you have not activated your account, you will be prompted to activate it (see under the section [Account Activation and Profile Setup](#)). If you do not have an account, you will be redirected to the registration page.

First registration to the Portal

Step 1

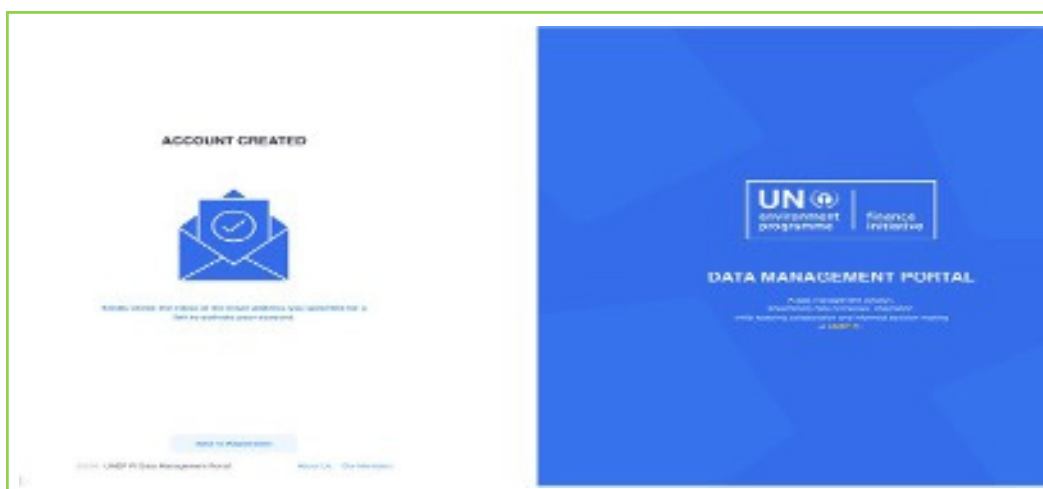
Fill in the required information in the Registration Page – (“*” denote mandatory fields) and Click 'Sign Up':



The screenshot shows the 'CREATE AN ACCOUNT' page of the UNEP FI Portal. At the top, it says 'CREATE AN ACCOUNT' and 'Fill in the following details to add an account'. Below this is a red error message: 'The account does not exist, add one to login'. The form fields are: 'Preferred Salutation' (dropdown), 'First Name *' (text), 'Middle Name' (text), 'Last Name *' (text), 'Email Address *' (text), and 'Institution *' (dropdown). At the bottom of the form is a red 'Sign up' button. Below the button, it says 'Already have an Account? Sign In'. On the right, there is a blue background with the UNEP FI logo and the text 'THE UNEP FI PORTAL'. Below the logo, it says 'A data management solution, streamlining data collection, integration, while fostering collaboration and informed decision-making at UNEP FI.'

Step 2

A confirmation screen will appear indicating that your information has been saved successfully. An activation email will be sent to the address you provided to verify that it is valid and active.



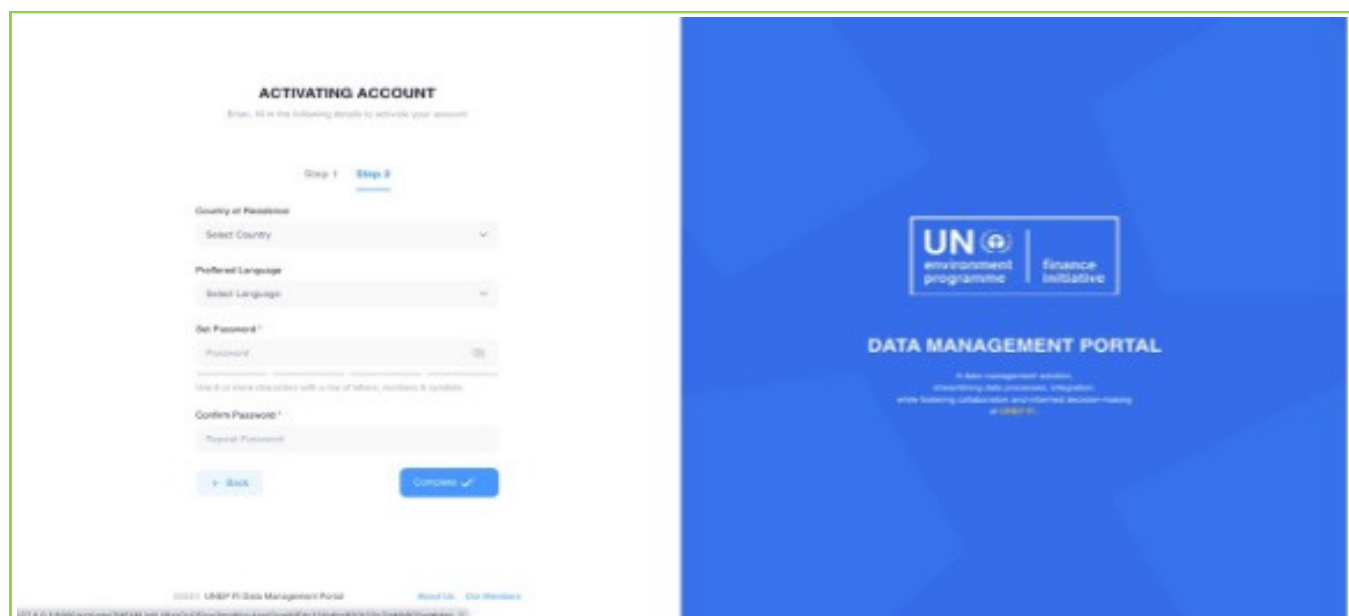
Account Activation and Profile Setup

1. Check your email

- Look for an activation email from **“UNEP FI Portal”** at the address you provided.
- If you don't see it in your inbox, check your **Junk** or **Spam** folder.

2. Activate your account

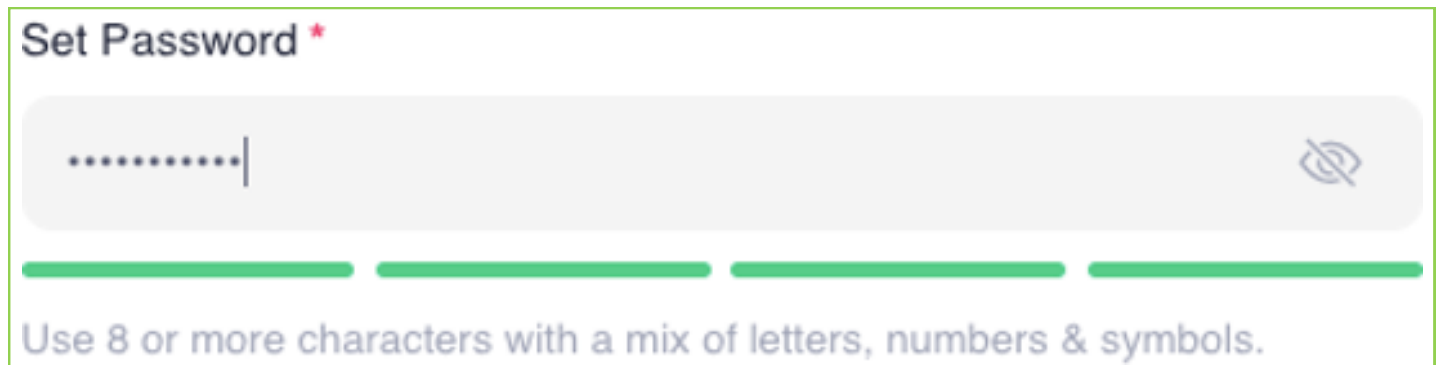
- Click the “Activate Account” link in the email - alternatively, copy and paste the URL provided into your browser.
- You will be redirected to the Account Activation Page.



3. Fill in the required information (“*” denote a mandatory field)

4. Click “Continue” to proceed to the next step.

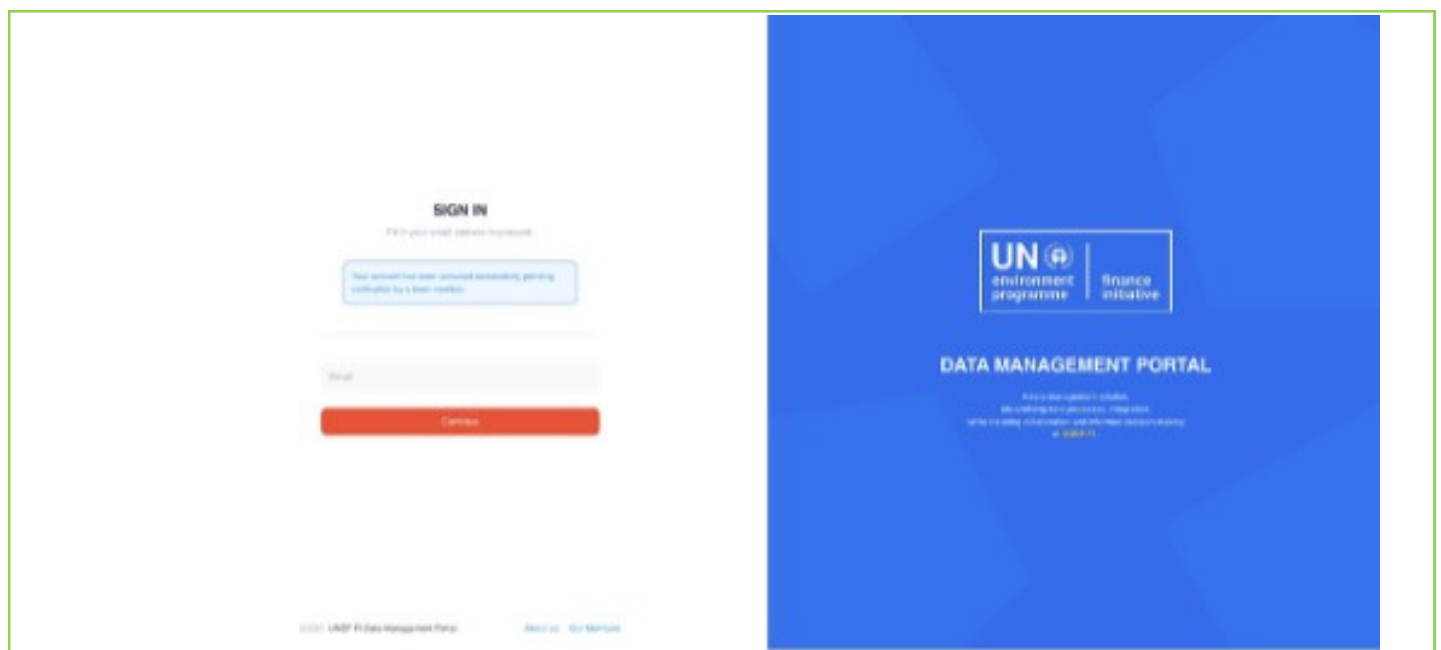
5. Set up and confirm a secure password



The image shows a 'Set Password' screen. At the top, the text 'Set Password' is followed by a red asterisk. Below this is a large text input field with a password mask of dots and a vertical cursor. To the right of the input field is an eye icon with a diagonal line through it, indicating that the password is hidden. Below the input field is a green progress bar with four segments, the first of which is filled. At the bottom, a message reads: 'Use 8 or more characters with a mix of letters, numbers & symbols.'

6. Click ‘Complete’

You will be informed that your account has been activated successfully, pending verification by a team member - another person from your organization who already has access to the Portal. If you do not know of any - or are the first contact from your institution to use the Portal- contact UNEP FI (signatory@unepfi.org)



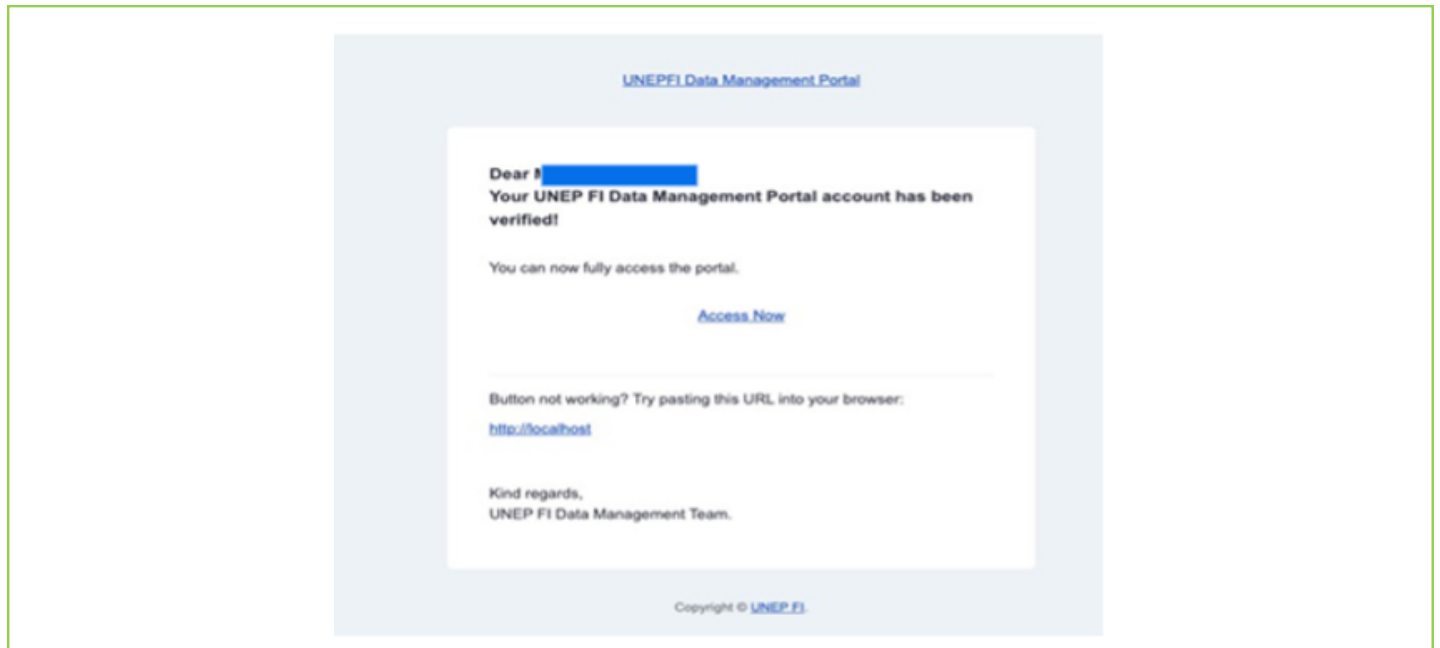
The image shows two side-by-side screenshots of the UNEP FI Data Management Portal. The left screenshot is the 'SIGN IN' page. It features the text 'SIGN IN' and a sub-header 'If you've used this device before'. Below this is a message in a blue box: 'Your account has been activated successfully, pending verification by a team member.' There is a text input field for 'Email' and a red 'Continue' button. At the bottom, it says '© 2021 UNEP FI Data Management Portal' and 'About us | Get Support'. The right screenshot is the 'DATA MANAGEMENT PORTAL' page. It has a blue background with the UNEP FI logo (UN environment programme | finance initiative) at the top. The title 'DATA MANAGEMENT PORTAL' is in the center, followed by a subtitle: 'A secure system to collect, store, and manage your organization's data. While creating, maintaining, and updating your data, you can also share it with others.' At the bottom, it says '© 2021 UNEP FI'.

Account Verification

Verification ensures that only users from a specific institution have access to this institution's data.

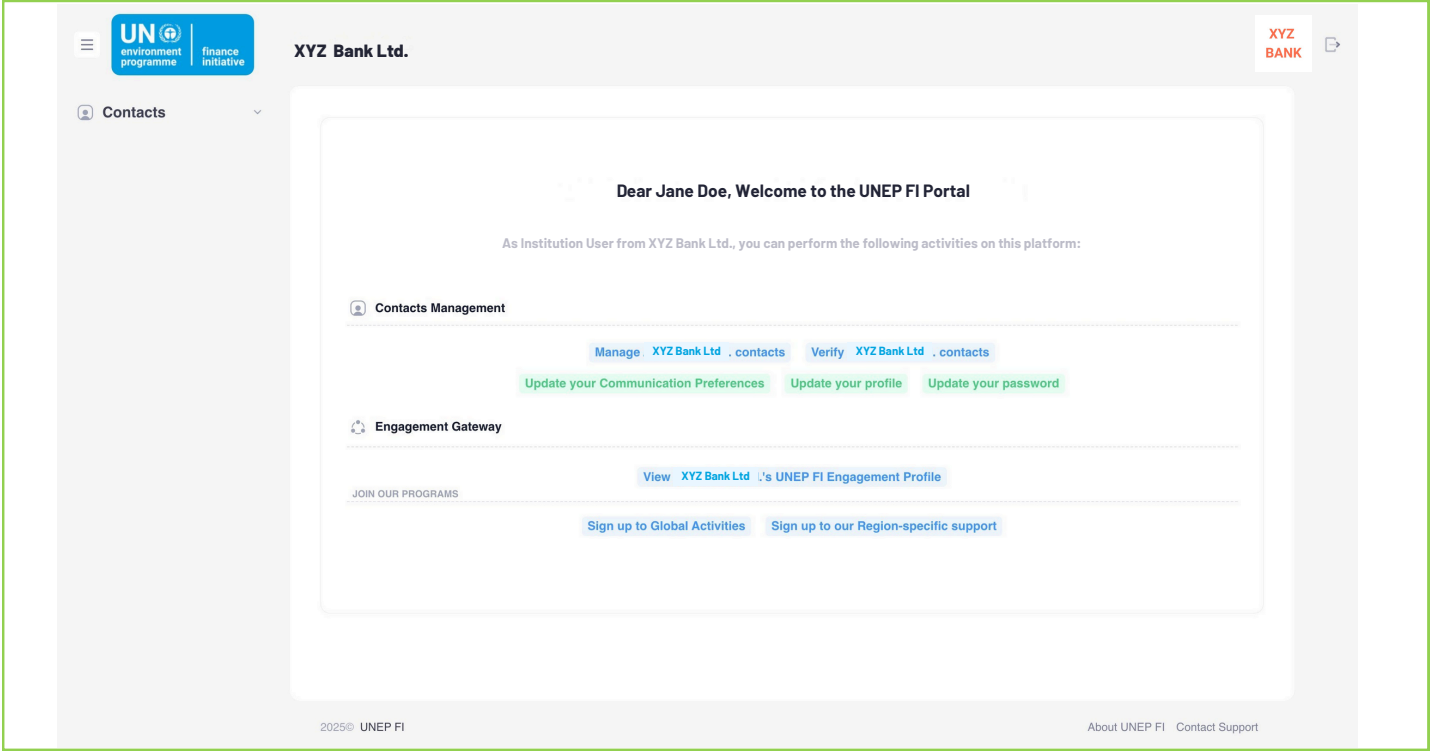
You need to reach out to a member of your institution who already has access to confirm your identity (verification). If you do not know of any, contact UNEP FI (signatory@unepfi.org)

Once verified, you will receive an email from the portal informing you that your account has been verified (Check your 'inbox' then 'Junk' or 'Spam' folders if absent):



You will now be able to login with your email and password and fully access the portal at <https://portal.unepfi.org/>.

Navigating the Home Page



You can always navigate to the home page by clicking the 'UNEP FI' image on the top-left section:

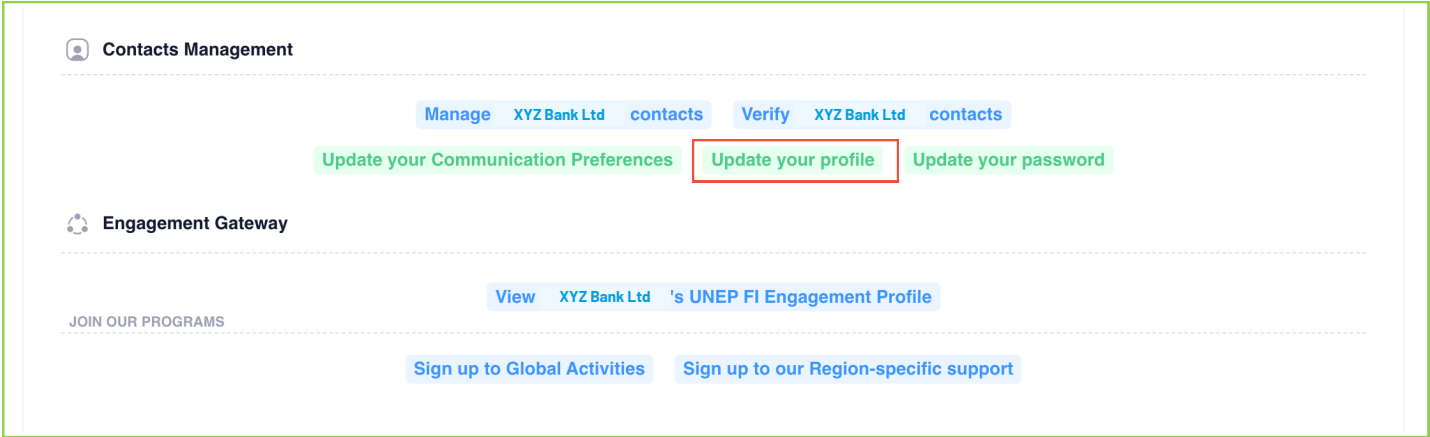


Manage Your Personal Profile

You can update your profile, password and communication preferences any time.

Update Your Profile

From the Home page, select the “Update your profile” Tab



You will be directed to the profile page, where you can modify the desired fields. Information denoted by “*” is mandatory

A screenshot of the 'Update Profile' form. The form is titled 'Update Profile' and has a breadcrumb 'Home > Update Profile'. It features a sidebar on the left with a list of fields: Display Picture, Contact Information, First Name*, Middle Name, Last Name*, Email Address*, Job Title(s), Department(s) (example), Communication Preferences*, Country of Residence, Language of preference, CEO Equivalent, CEO Equivalent, and Notes. The main content area contains the corresponding input fields: a profile picture placeholder, a 'Select Solution' dropdown, text fields for First Name, Middle Name, Last Name, and Email Address, a 'What can UNEP FI contact you about?' dropdown with options 'FIQ Newsletter' and 'UNEP FI Newsletter', a 'Select Country' dropdown, a 'Select Language' dropdown, two toggle switches for 'Is your firm a or equivalent to a CEO?' (one for 'Yes' and one for 'No'), and a large text area for Notes. The form is styled with a light gray background and blue accents.

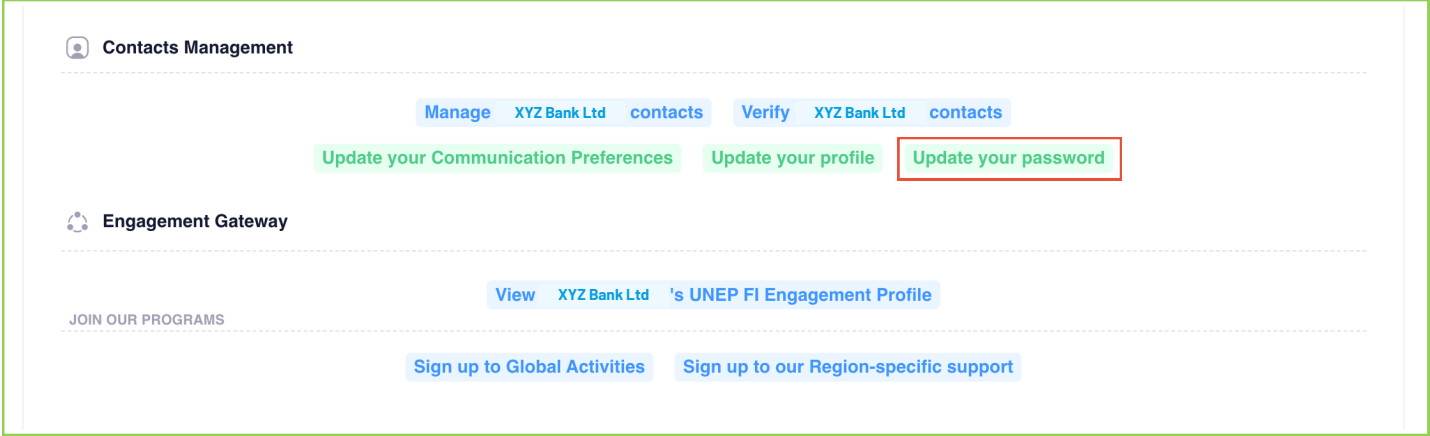
When finished, click 'Save' :



Change Your Password

You can change your password any time, either by navigating from the home page or from the Profile page.

From the Homepage



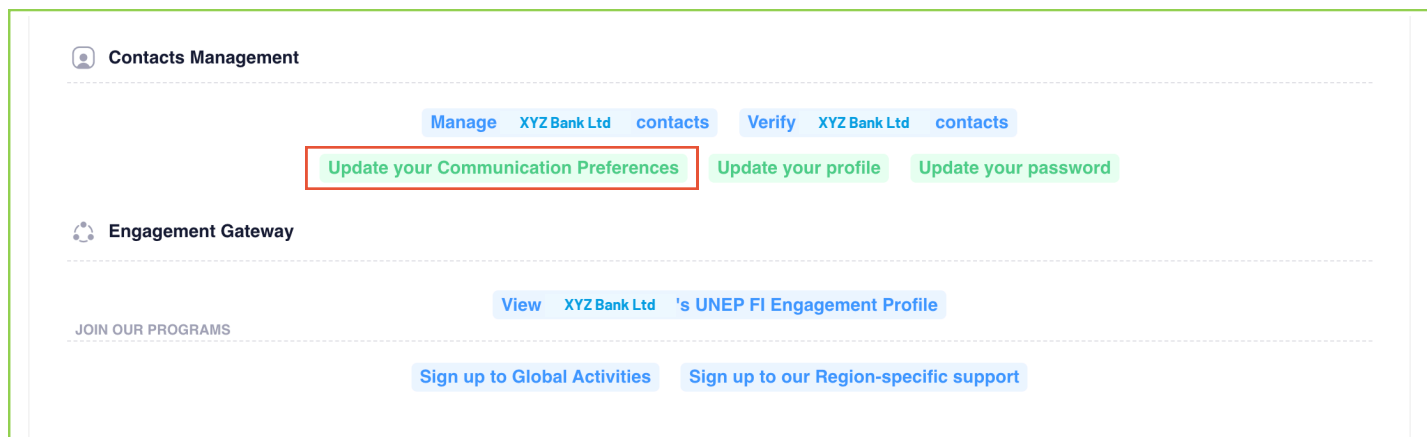
From the Profile Page



Update Your Role and Communication Preferences

By default, all contacts will receive regular updates from UNEP FI, thus you would need to opt-out in case you do not want to receive a particular communication.

Click 'Update Communication Preferences' from the Homepage:



You can modify this field in order to get relevant updates.

Primary focal points should sign up for **all communications and updates**

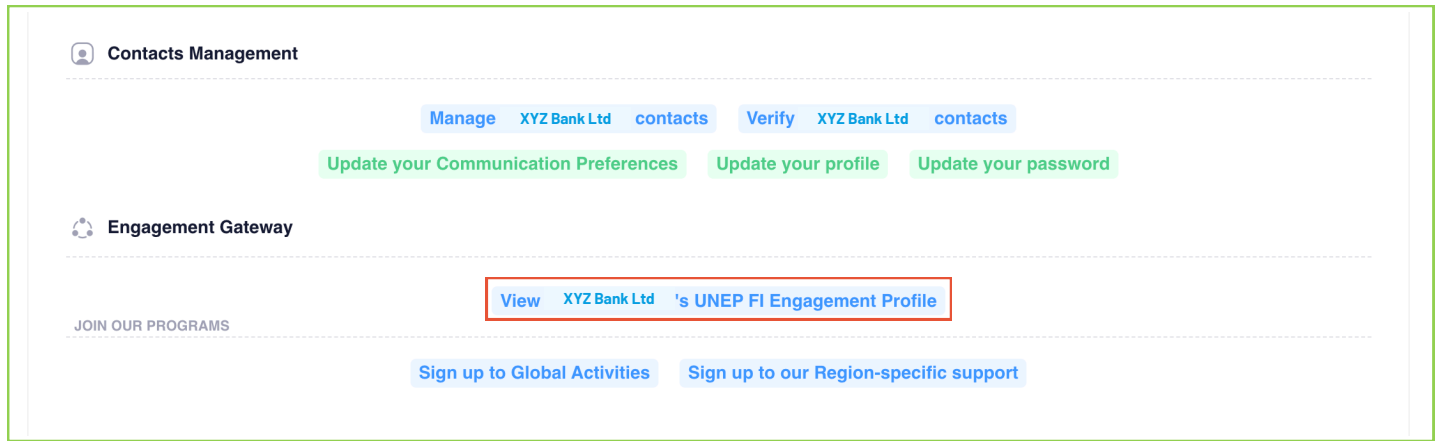


Examples of communication items include:

- Main newsletter and updates
 - UNEP FI Regional Newsletter
 - In English & Spanish
 - Updates covering activities across UNEP FI industries and thematic
- Monthly PRB Update
 - Industry update – banking news for PRB signatories
 - PRB implementation focused
- Other ad hoc communication, linked to your role, covering items like invoicing, reporting, etc..

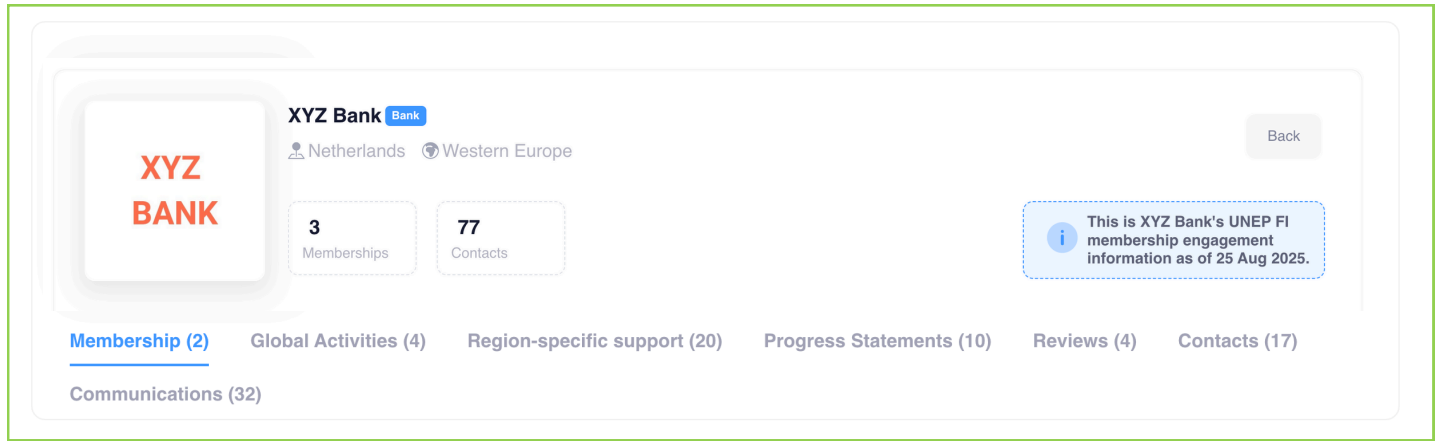
View your institution's engagement profile

The Portal provides you with real-time access to information about your institution's UNEP FI membership and the activities it has engaged in. From the home page, click "[View Membership Profile](#)" under the Engagement Gateway section



Your Membership Profile is organized into seven main sections, accessible through the navigation header: Membership, Global Activities, Region-specific support, Progress Statements, Review and feedback process, Contacts and Communications.

General details for your institution are displayed on every page of your profile, including the trading name, institution type, country, region, number of membership affiliations and number of contacts.



Here are the contents of the different sections:

Membership

Here you will see your Membership status and frameworks your organization is signed up to.
Direct link:

<https://portal.unepfi.org/fi-profile/membership>

Membership	
Membership	
1	UNEP FI
2	Principles for Responsible Banking Signatory Since 22 Aug 2019

Global Activities

This section includes current and past participation of your institution in UNEP FI workstreams, communities of practice, and pilots, organized at global level. Details include name of the activity, type, participants from your institution, themes and topics covered, each participant’s role in the activity, and the date of joining. A link will be available from this page through which you can request to participate in other activities.

Direct link: <https://portal.unepfi.org/fi-profile/activities>

Membership Activities							
Click here to view more UNEP FI Activities and request to participate in them.							
	Membership Activity	Status	Type	Participants	Themes/Topics	Role	Since
11	Financial Health 2022	Completed	Workstream	2 Jane Doe 1 John Doe on		Co-lead	29/01/2024
12	PRB Adaptation Pilots 2024	Completed	Workstream	2 John Doe Jane Doe		Member	12/03/2024
13	Just Transition Consultative Committee	Active	Committee	1 Jane Doe		Member	12/03/2024
14	Human Rights Community of Practice	Active	Community of Practice	1 John Doe	Social Issues	Member	12/03/2024

Region specific support

This includes information on participation in regional workshops and members' only webinars. You can see the name of colleagues who attended sessions, the dates, and the type of topics covered. A link to the UNEP FI Members area where you can consult forthcoming workshops and register (password protected), is also provided.

Direct link: <https://portal.unepfi.org/fi-profile/events>

Implementation Support					
Click here to view more UNEP FI Implementation Support programmes.					
	Name	Date	Type	Participants	Themes/Topics
1	PRB Implementation Support for APAC: Transition Finance Sectoral Series: How to Decarbonise Steel Industry	14/10/2025	Regional Implementation/CB Workshop	5 Total, 5 on Portal	
2	Clients & Customers Worktrack - Info session	02/10/2025	Members (private) webinars - global	2 Total, 1 on Portal	
3	PRB Implementation support for Europe on Energy Efficiency: Deep Dive on Client Engagement	29/09/2025	Regional Implementation/CB Workshop	2 Total, 2 on Portal	Pollution and Circular Economy
4	Financial Inclusion: Capturing Realities: Data collection for impact	25/09/2025	Members (private) webinars - global	2 Total, 2 on Portal	Financial Health and Inclusion
5	ESRS Simplification: Considerations for Financial Institutions	04/09/2025	Members (private) webinars - global	1 Total, 5 on Portal	Financial Health and Inclusion
6	Integrating Climate-Related Risks into Financial Regulation in APAC	08/07/2025	Regional Implementation/CB Workshop	2 Total, 5 on Portal	Climate

Progress statements

In this section you will be able to see when your organization has submitted its previous annual progress statements and when the next ones are expected.

Direct link: <https://portal.unepfi.org/fi-profile/events>

<div><div><div>XYZ Bank</div><div>Netherlands</div><div>Western Europe</div></div><div><div>3 Memberships</div><div>77 Contacts</div></div><div><div>Back</div><div>This is XYZ Bank's UNEP FI membership engagement information as of 25 Aug 2025.</div></div></div> <div><div>Membership (2)</div><div>Global Activities (4)</div><div>Region-specific support (20)</div><div>Progress Statements (10)</div><div>Reviews (4)</div><div>Contacts (17)</div><div>Communications (32)</div></div>						
Progress Statements						
Ordered by expected date (earliest first)						
#	Report	Extensions	Expected Date	Submission Date	Publication Date	Status
1	PRB Report 1	0	02/03/2021	N/A	12/03/2021	submitted
2	PRB Report 2	0	12/03/2022	N/A	01/06/2022	submitted
3	PRB Report 3	0	30/04/2023	N/A	10/05/2023	submitted
4	PRB Report 4	0	11/03/2024	17/05/2024	28/03/2024	submitted
5	PRB Report 5	0	11/03/2025	02/05/2025	28/03/2025	submitted

Reviews

This section includes information on the number of Review and Feedback meetings that your institutions had, the participants from your institution, the relevant impact areas your institution has identified, and information on the forthcoming meetings. You will also find the contact for the UNEP FI Review Team (PRBreporting@unepfi.org)

Direct link: <https://portal.unepfi.org/fi-profile/reviews>

Membership (2)

Global Activities (4)


Region-specific support (20)

Progress Statements (10)

[Reviews \(4\)](#)

Contacts (17)

Communications (32)

 **Reviews**


For questions/queries about reviews, please contact the UNEP FI Review Team, email: PRBreporting@unepfi.org

	Meeting Date	Most significant Impact Areas		
1	04/06/2025	Climate change mitigation	Financial health & Inclusion	
2	03/07/2024	Climate change mitigation	Financial health & Inclusion	Gender equality
3	24/08/2023	Climate change mitigation	Financial health & Inclusion	Gender equality

Contacts

View your institution contacts, including names, job titles, communication preferences and a link to directly access the contact management page (more information on the 'Manage Contacts' section).

Direct link: <https://portal.unepfi.org/fi-profile/contacts>

 Contacts		Click here to manage (add, change, remove) your contacts.		
	Name	Email	Job Title	Communication Preferences
1	John Doe	john.doe@xyz.com	Sustainable Finance Vice President	PRB Newsletter, NZBA Newsletter, NZBA Membership Update Call
2	Jane Doe	jane.doe@xyz.com	Group Head Sustainability Integration & Implementation	PRB Newsletter, NZBA Newsletter, NZBA Membership Update Call
3	John Doe	john.doe@xyz.com		PRB Newsletter
4	Jane Doe	jane.doe@xyz.com		PRB Newsletter
5	John Doe	john.doe@xyz.com	Nature	PRB Newsletter, Workstream / Activity Communications
6	Jane Doe	jane.doe@xyz.com	I	PRB Newsletter
7	John Doe	john.doe@xyz.com	Director, Head of Energy Sector Belgium	PRB Newsletter, NZBA Newsletter, NZBA Membership Update Call

Communications

View official email communications that have been sent from UNEP FI to your institution, including title, date and contacts engaged.

Direct link: <https://portal.unepfi.org/fi-profile/campaigns>

Communications			
	Name	Date	Contacts Engaged
1	PRB update October 2025	21/10/2025	Jane Doe John Doe John Doe John Doe John Doe John Doe John Doe
2	Member Newsletter September	30/09/2025	Jane Doe Jane Doe Jane Doe
3	PRB update September 2025	22/09/2025	Jane Doe Jane Doe Jane Doe John Doe John Doe John Doe John Doe John Doe John Doe John Doe John Doe John Doe John Doe
4	External newsletter September 2025	10/09/2025	Jane Doe
5	Member Newsletter August	29/08/2025	Jane Doe John Doe John Doe John Doe John Doe John Doe Jane Doe

Sign up to our Global and Regional Activities

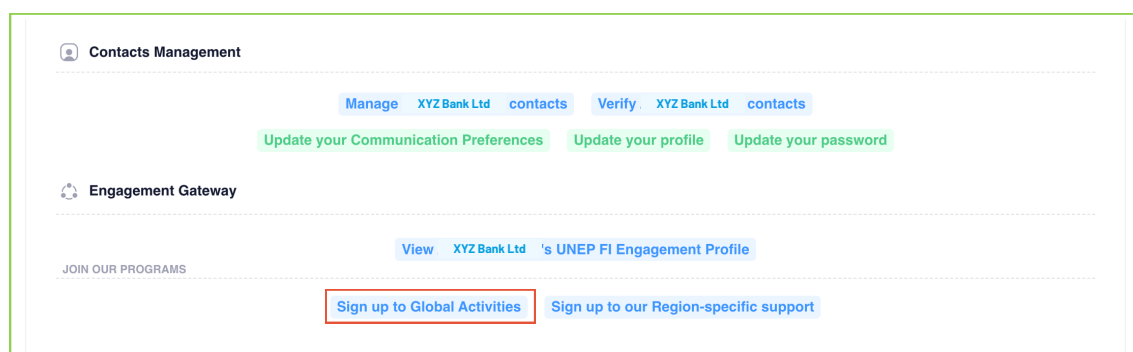
UNEP FI offers a comprehensive range of activities throughout the year, to support your institution's responsible banking journey. You can register for region-specific workshops to access technical capacity building and implementation support, or actively participate in global activities such as workstreams, pilots and communities of practice for peer learning and sharing opportunities, and to co-create with peers and experts.

Sign up to Global Activities

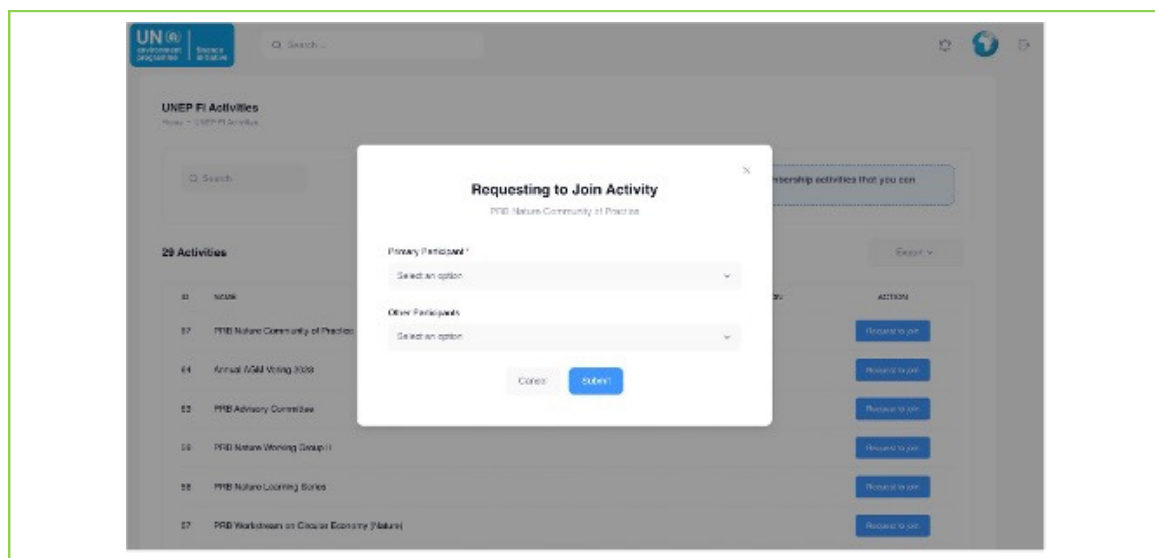
UNEP FI facilitates several activities at global level, including workstreams, communities of practice, and pilots. These activities are presented through the annual Workplan, published on the [UNEP FI Members' Area](#).

Member institutions can indicate their interest in joining activities through the Portal, as follows:

1. Once logged in, from the Home Page click on "Sign up to Global Activities". This page enables you to request to join activities of interest.



2. Select contacts from your institution who want to participate in the activity, starting with the Primary Participant. Click the "Submit" button to complete the request



Your action will generate a request. You will receive an email once your request is approved.

You will be contacted by the relevant UNEP FI colleague with information about your enrollment.

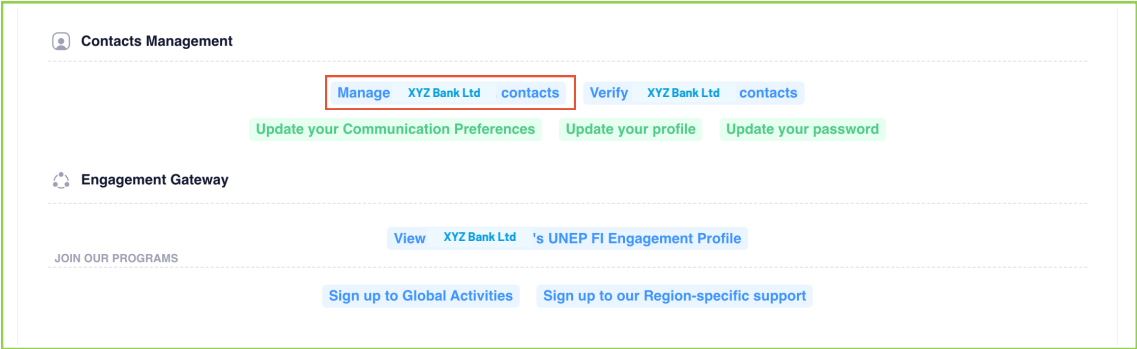
Sign up to our Region-specific support

These Region-specific opportunities cover a range of topics including impact analysis, climate mitigation and adaptation, nature, healthy and inclusive economies, human rights and regulation. Explore upcoming workshops and resources by topic and register directly from the [Members' area](#) (password protected, reach out to your regional contacts or the Secretariat at signatory@unepfi.org if you do not have it).

Impact Analysis Understand and implement the impact analysis process →	Climate Change Climate mitigation & adaptation and just transition activities →	Nature & Biodiversity Integrate nature into business strategy and set targets →
Healthy & Inclusive Economies Financial health & inclusion, gender equality and decent work →	Human Rights →	Pollution & Circular Economy Energy efficiency, resource efficiency, and circular economy →
Client Engagement →	Regulatory Implementation Support programme on CSRD implementation for signatories →	PRB Academy Find the latest courses of the training programme for banks →

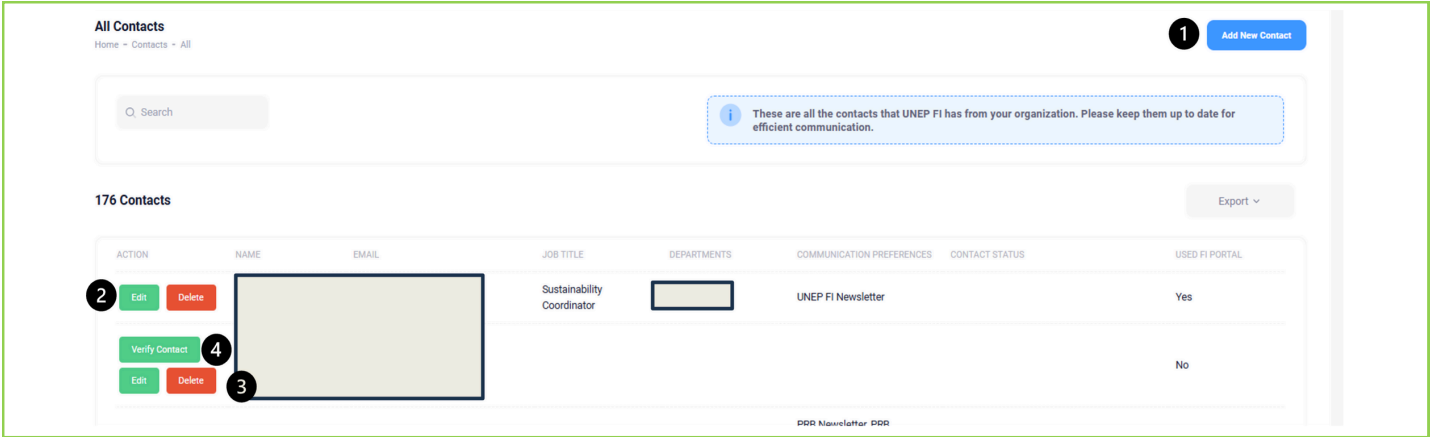
Manage Contacts

Through the Portal, you can manage all your institutions' contacts. From the 'Home' page click the 'Manage Contacts' button



You will be redirected to the 'Contacts' page.

From this page you will be able to 1.Add, 2.Edit, 3.Delete 4. Verify Contacts



Add a New Contact

From the All-contacts page:

1. Click the 'Add new contact' button
2. Fill in the required information (“*” denote a mandatory field)

In the **Communication Preferences** field, you can identify the contacts in charge of different responsibilities within your institution vis-à-vis UNEP FI, to ensure that relevant communication and contact points happen with the relevant individual(s) from member institutions. Institutions must make sure they identify:

- **“All(Main Contact)”**: their main central point of contact for PRB related matters, copied in most PRB communications, including important governance related issues (voting etc.), reporting, review meetings, etc., This contact is also responsible for keeping the member institution’s contact list updated in the Portal (e.g., by adding or removing relevant colleagues). **Members can indicate more than one main contact.**
- **PRB Individual Review and Feedback process**: the focal point to be contacted regarding PRB annual reports and review meetings.
- **PRB Communications Focal Point**: will receive information about PRB communication campaigns etc. and the UNEP FI communications lead **will** liaise with them for specific purposes related to communication.
- **Invoicing and Finance**: the main focal point that would be contacted for membership fee payment and other invoicing enquiries.

Communication Preferences

What can UNDP FI contact the person about? *

PRB Newsletter

Learning and Development

Invoicing and Finance

AR(Main Contact)

AR(Secondary Contact)

Workstream / Activity Communications

PSI Newsletter

CEO Equivalent

CSO Equivalent

Country of Residence

Language of preference

Notes

Please note that you must select all communications preferences you wish to receive, e.g., the Main contact wishing to receive the PRB Update must also select the “PRB Update” in the Communication Preferences list.

In addition to selecting the appropriate Communication Preferences, indicate if the contact is:

- The 'CEO' or equivalent
- A 'CSO' or equivalent

3. Give/ modify permissions:

During contact registration, you will also be able to customize your contacts' permissions, e.g., who can modify your institution's details or contacts, who can view or submit your institution's PRB reports.

Modify Permissions

Main Focal Point

Can view institution details?

Can edit institution details?

Can view institution contacts?

Can edit and verify institution contacts?

Can delete institution contacts?

Can view institution reports ?

Can submit institution reports ?

Can delete institution reports ?

Can view institution details?

No

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Discard

Save

4. Click the 'Save' button.

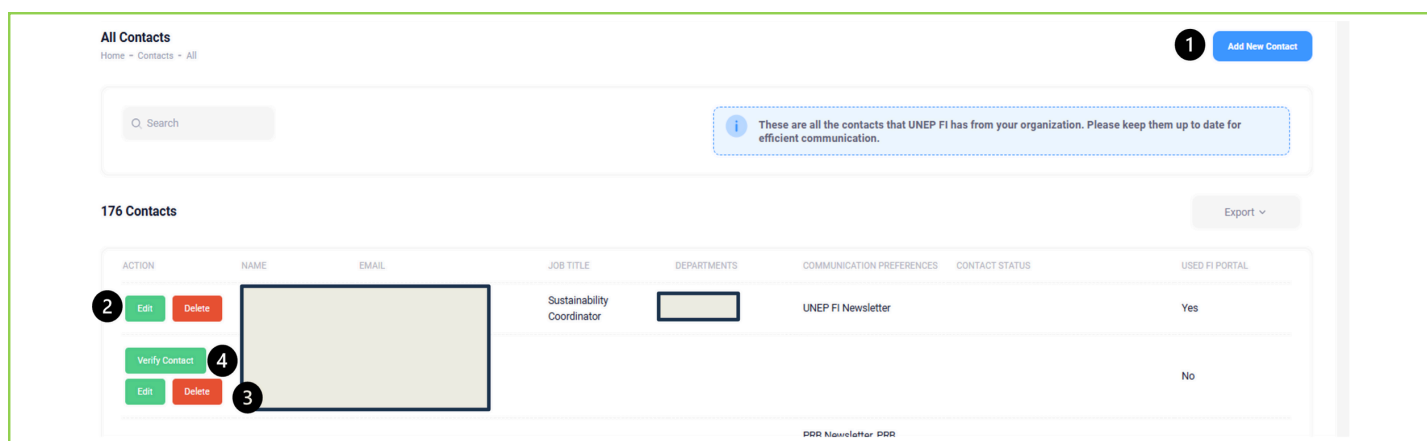
The contact will be saved, and a message will be displayed:



An email will also be sent to the specified address informing them that an account has been created for them, with instructions to activate their account:

Edit/Delete Contacts

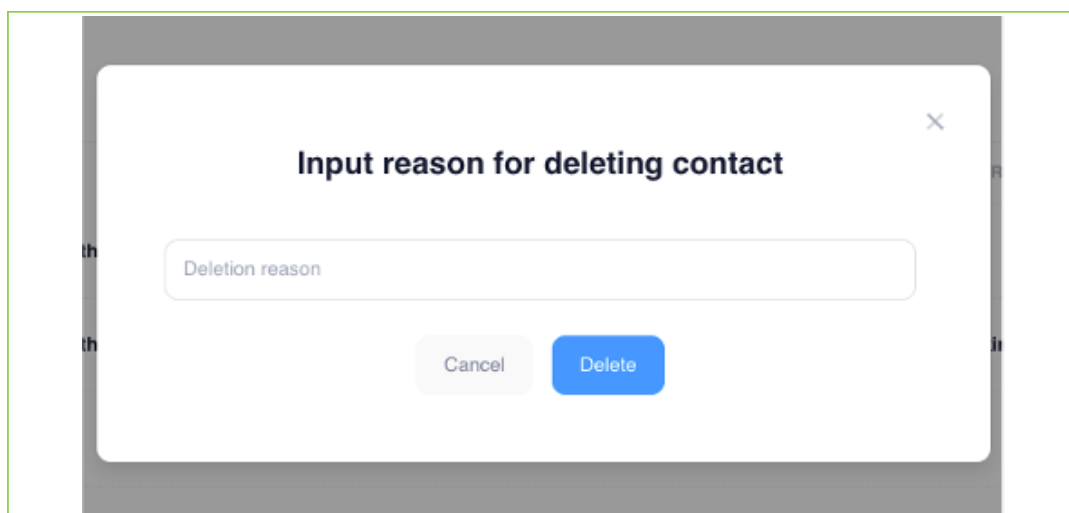
From the All-contacts page, for each contact, you have the option to Edit, Delete and sometimes to verify (when verification is still required for that contact)



1.Go to the contact you wish to Edit or Delete and press the button ,

2.Click the 'Save' button.

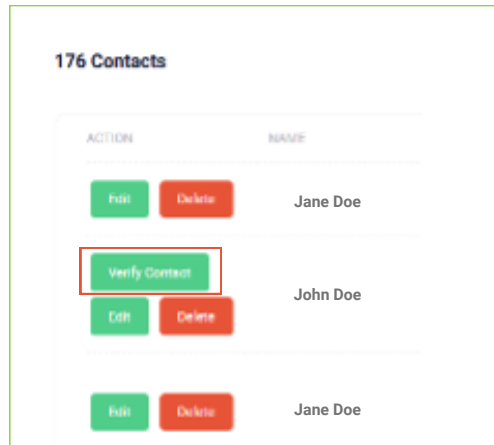
The contact details will be updated / deleted accordingly. When you delete a Contact, you will be prompted to fill in a short reason for deleting the contact:



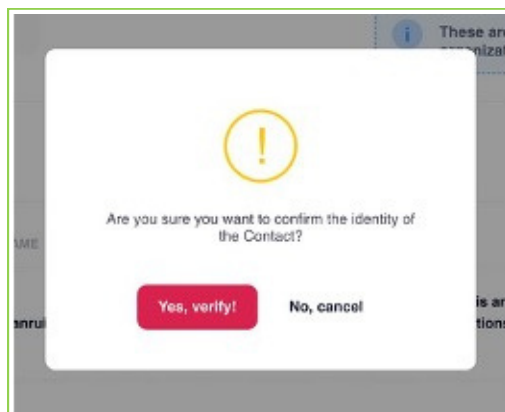
Verify a Contact

Follow this process to confirm the identity of a contact on the portal (See also the section “Account verification”). This grants contacts access to your institution's information, therefore, **only verify contacts that you know**

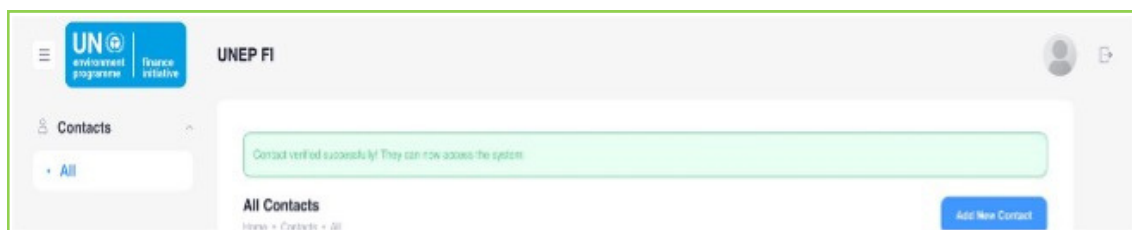
1. On the contacts table, Click the 'Verify Contact' button on the contact you would like to verify. You will be prompted to confirm verification of the contact's identity:



2. Click the 'Yes, verify!' button to confirm the contact's identity.



The contact's identity will be confirmed, an email will be sent to them to inform them of their verification, and a message will be displayed on the screen:



Support

For further information on the Responsible Banking Journey, click here : [Responsible Banking Journey – United Nations Environment – Finance Initiative](#)

If you encounter any issues or have questions:

- Email UNEP FI Secretariat signatory@unepfi.org
- Contact your [regional UNEP FI focal point](#)