



Meet IRIS, Your New Licensing Platform

April 28, 2022



BC Financial
Services Authority

Classification: Protected A

Agenda

- Welcome and Introductions
- Why IRIS?
- Walkthrough the IRIS Licensing Platform
- Questions

Speakers

Bruce McCoubrey
Practice Standards Advisor

Pamela Skinner
Vice President,
Regulatory Services

Chris Heald
Solutions Delivery Manager

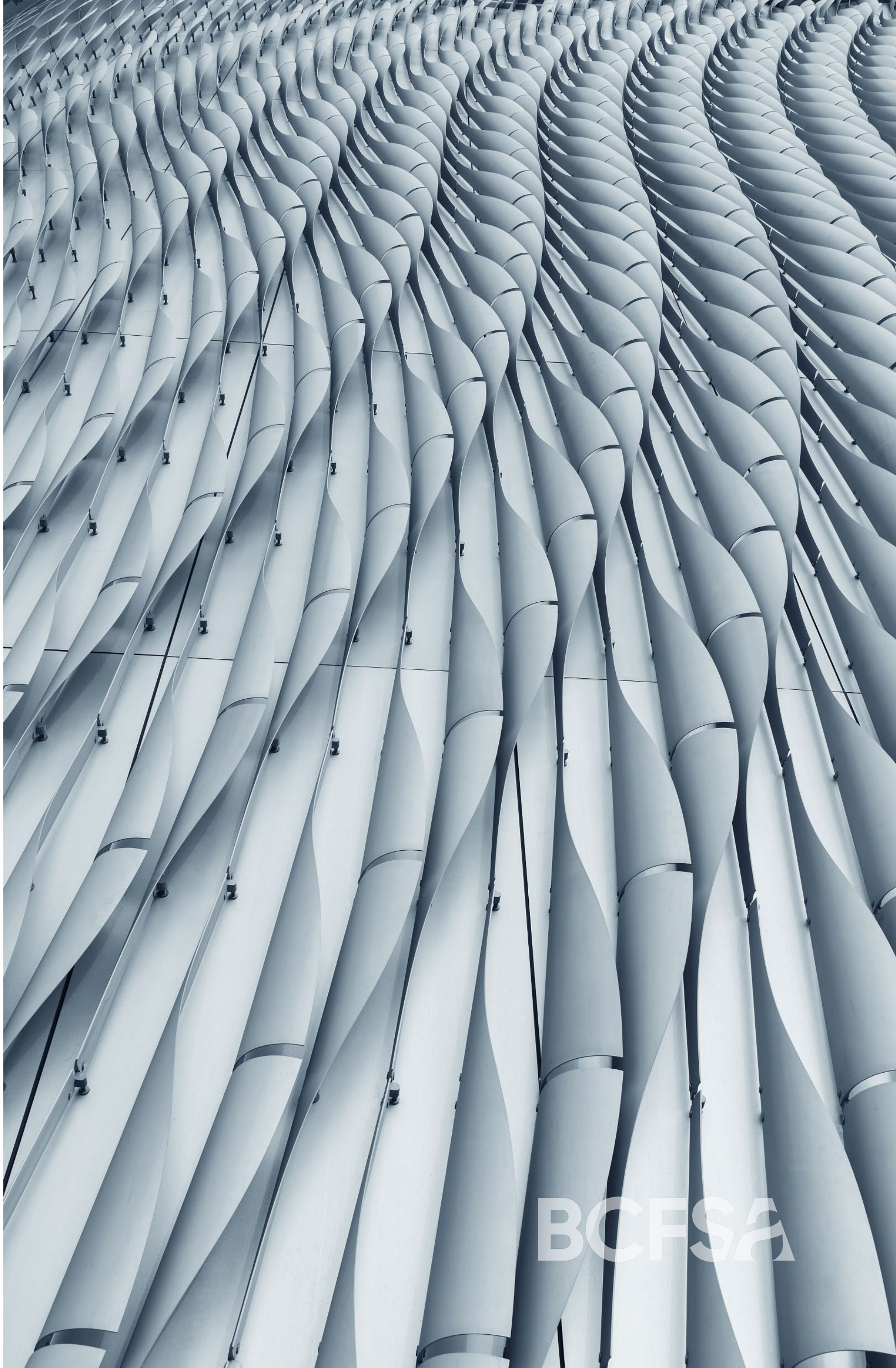


Overview Integrated Regulatory Information System ("IRIS") Platform

An Integrated Regulator

BCFSA is the integrated regulator of B.C.'s Financial Services Sector which includes:

- Credit Unions
 - Insurance Companies
 - Trust Companies
 - Mortgage Brokers
 - Pension Plans
 - Real Estate Services
 - Real Estate Development Marketing
- BCFSA is also accountable for administering the Credit Union Deposit Insurance Corporation of BC (“CUDIC”)
 - Each regulated entity uses its own distinct license, registration and submission system.
 - Amalgamation of real estate regulation into BCFSA presented the opportunity for integration, streamlining and agility in processes and resources.



BCFSA

Modern, Effective, and Efficient

- BCFSA is working to become a modern, effective, and efficient integrated regulator
- This includes digitizing and automating processes, some of which are currently PDF or paper-based.
- IRIS will help to improve information quality, data collection, managing documents, reporting and accessibility that will support BCFSA's overall regulatory effectiveness into the future.



Accessing IRIS

- **What?** a modern customer relationship management (CRM) system.
- **When?** Scheduled to launch on May 30, 2022
- **Where?** Accessible via the new BCFSA website enabling more efficient, automated submissions, filing, and review processes



A Single Online Portal

The IRIS project was driven by a recognition that there was an opportunity to **streamline processes** for licensees with the aim of **reducing administration burden** on managing brokers and their offices.



Saving Time

Shifting more **licensing processes online** **reduces the time** to review your licensee's applications.

Limits common errors and omissions (such as missing information) compared with paper-based submissions.



Using IRIS

MANAGING BROKERS

Ensure your licensees information is up-to-date in one place.

LICENSEES

Renew a licence, transfer to another brokerage, update contact information, and pay fees in one easy-to-use, secure online portal.

Real estate licensees are already used to interaction via a web portal – IRIS expands this functionality.



Meet Your New Licensing Platform

What's Coming and What's Changing for You?

- Simpler way to review licensee applications
- Built in payment system
 - BCFSA will no longer accept cheques
 - Payments are much more secure
- Roadblocks if new licence application is incomplete
 - This will mean MBs will only see cleaner, complete applications
- Education history for licensees and completion dates will be indicated
 - Have courses been completed?
 - Easier to locate information



Signing Up and Signing In

What individual licensees will see after successful sign up

BCFSA

HOME

NEW SUBMISSION

PAYMENTS

TS LANG

Home

Welcome to the BCFSA portal. This is where you can see at a glance any submissions to be completed. It also gives you quick access to information about any organizations that you administer.

Personal Dashboard

Submissions initiated by you and scheduled for you by BCFSA are shown in the Personal Submission list. If you have one or more personal business authorizations, including licences and registrations, they will be listed here.

To initiate a new submission, select 'New Submission' from the menu at the top of the page.

Personal Business Authorizations-

Business Authorization number	Managing Entity	Sector	Type	Subtype	Expiry/End Date	Status Reason
RE603472	Prime Real Estate, Inc. / Your Prime Real Estate Experience	Real Estate	Licence	Representative	4/29/2022	Current

Personal Submissions-

ID	Due Date	Name	Date Submitted	Status Reason
SR021340	4/29/2022	Application for Licence Renewal: Individual		Draft
SR021262	4/29/2022	Application for Licence Renewal: Individual	4/19/2022 4:39 PM	Submitted



Signing Up and Signing In

What individual licensees will see after successful sign up

Individual licence(s)

Pending and completed submissions

BCFSA

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Personal Business Authorizations-

Business Authorization number +	Managing Entity	Sector	Type	Subtype	Expiry/End Date	Status Reason
REB03472	Prime Real Estate, Inc. / Your Prime Real Estate Experience	Real Estate	Licence	Representative	4/29/2022	Current

Personal Submissions-

Search

ID +	Due Date	Name	Date Submitted	Status Reason
SR021340	4/29/2022	Application for Licence Renewal: Individual		Draft
SR021262	4/29/2022	Application for Licence Renewal: Individual	4/19/2022 4:39 PM	Submitted

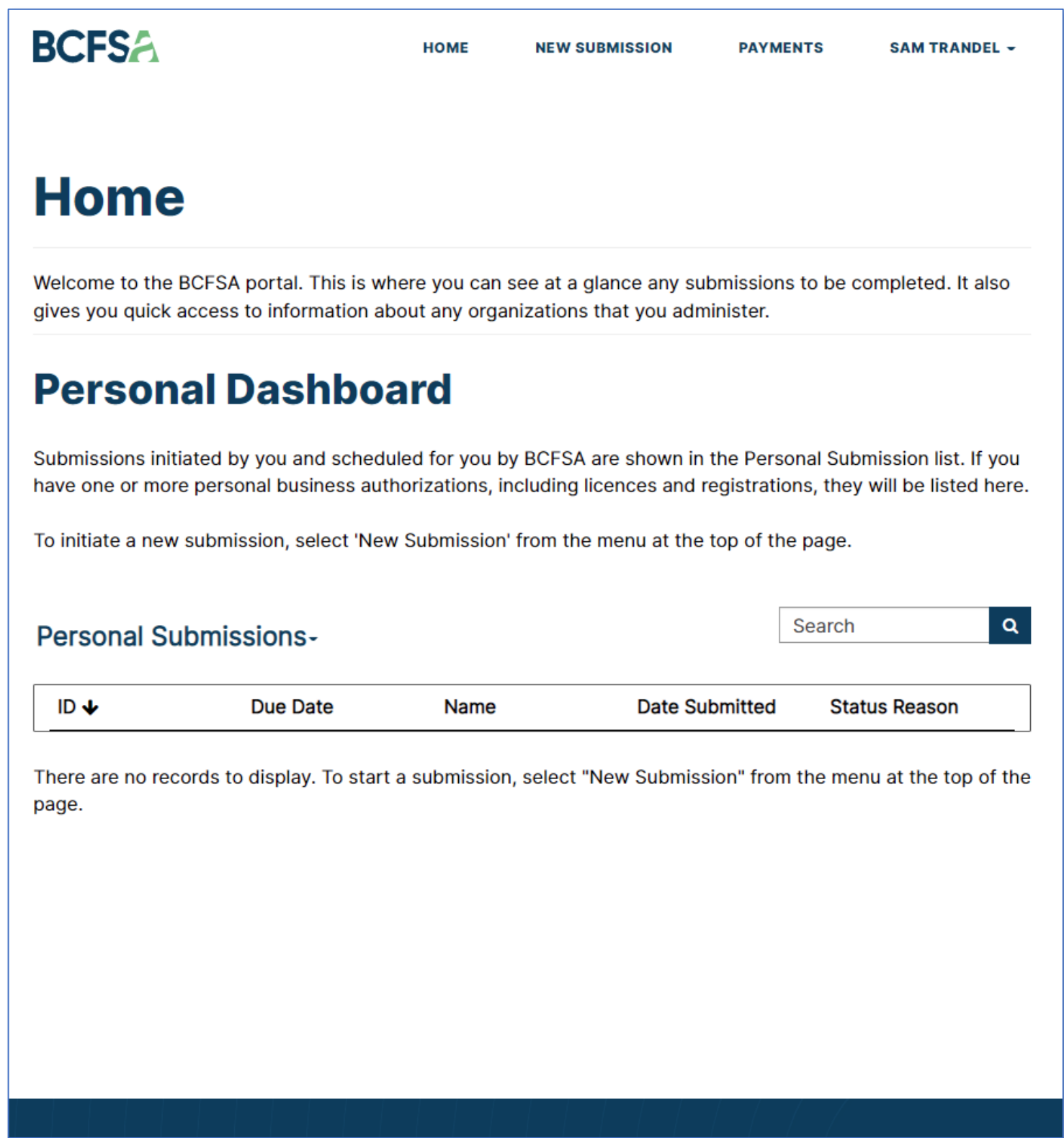


Troubleshooting if ...

- You sign up with an email that is not on file with BCFSA
- You try to reset your password when you have not yet signed up
- You try to sign up again, when you already have an account



Troubleshooting Tip 1



If you sign up with an email address that is not on file with BCFS A.

Solution:
Try again, sign up with the email address BCFS A has on file.



Troubleshooting Tip 2

BCFSA

HOME NEW SUBMISSION PAYMENTS SAM TRANDEL ▾

Home

Welcome to the BCFSA portal. This is where you can see at a glance and gives you quick access to information about any organizations you are authorized to view.

Personal Dashboard

Submissions initiated by you and scheduled for you by BCFSA. You can have one or more personal business authorizations, including those for your own organization.

To initiate a new submission, select 'New Submission' from the top navigation bar.

Personal Submissions-

ID ▾	Due Date	Name
There are no records to display. To start a submission, select 'New Submission' from the top navigation bar.		

< Cancel

iris

Integrated Regulatory Information System

- Please enter the email address that you used to sign up. If you have forgotten this email address please contact BCFSA.
- Click the 'Send verification code' button and check your mailbox for the email containing the code.
- Enter the verification code and click the 'Verify code' button.
- If you would like to use another email address, please click on the 'Use another email address' button.
- After your email address is verified, click the 'Continue' button to provide your new password.
- After entering your new password, you will be redirected to the sign in page.

An IRIS account could not be found for this user ID. If you have never logged into IRIS before click on 'Cancel' above and use the 'Sign up now' link. Logins from previous BCFSA systems have not been transferred to IRIS.

E-mail address verified. You can now continue.

@gmail.com

Change e-mail

Continue

If you try to reset a password, instead of signing up.

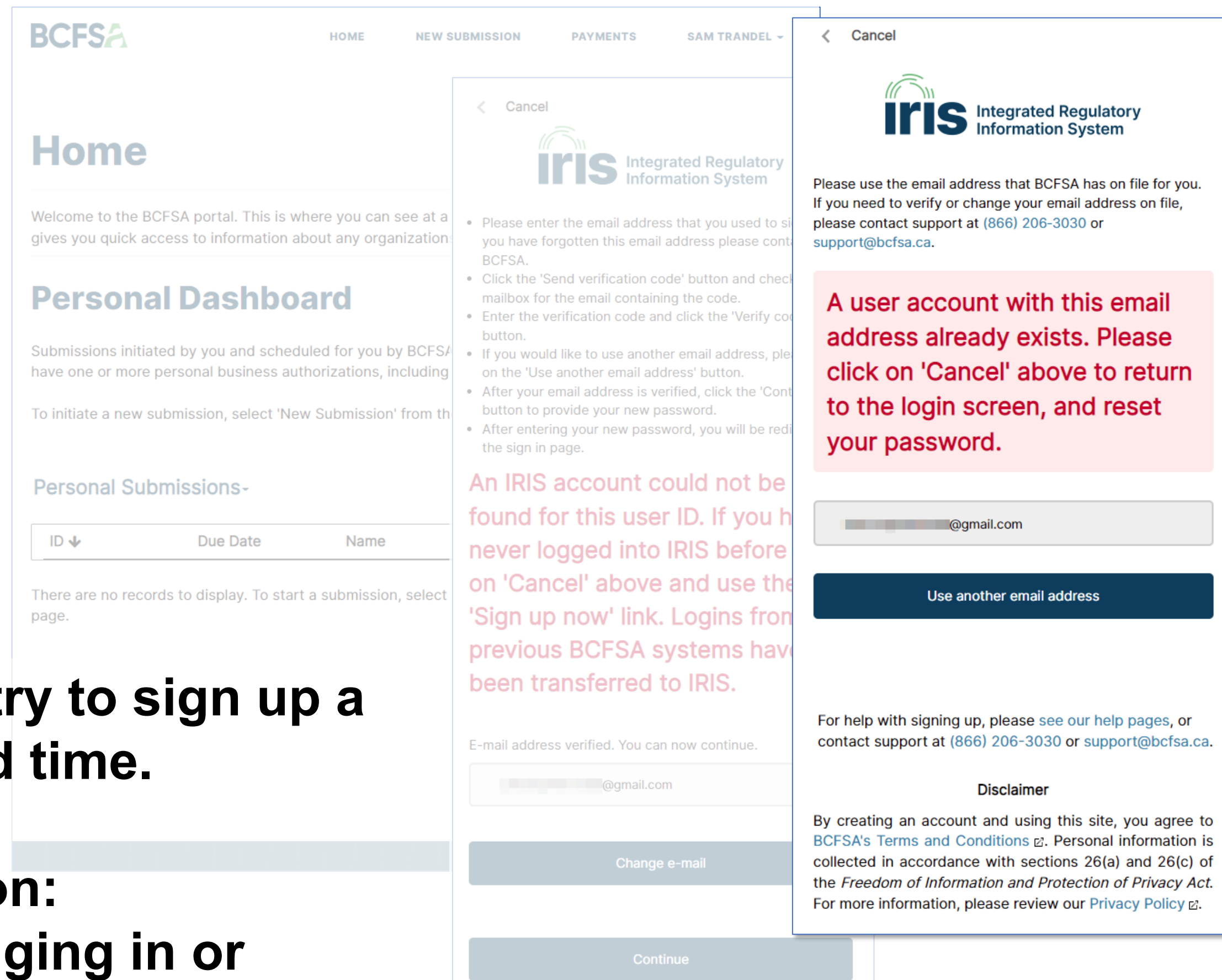
Solution:
Sign up first with email address on file



Troubleshooting Tip 3

If you try to sign up a second time.

Solution:
Try logging in or resetting your password.



BCFSa HOME NEW SUBMISSION PAYMENTS SAM TRANDEL

Home

Welcome to the BCFSa portal. This is where you can see at a glance and gives you quick access to information about any organization.

Personal Dashboard

Submissions initiated by you and scheduled for you by BCFSa. You can have one or more personal business authorizations, including:

To initiate a new submission, select 'New Submission' from the left-hand menu.

Personal Submissions-

ID ↓	Due Date	Name
There are no records to display. To start a submission, select 'New Submission' from the left-hand menu.		

IRIS Integrated Regulatory Information System

Please use the email address that BCFSa has on file for you. If you need to verify or change your email address on file, please contact support at (866) 206-3030 or support@bcfsa.ca.

A user account with this email address already exists. Please click on 'Cancel' above to return to the login screen, and reset your password.

Use another email address

For help with signing up, please [see our help pages](#), or contact support at (866) 206-3030 or support@bcfsa.ca.

Disclaimer

By creating an account and using this site, you agree to BCFSa's [Terms and Conditions](#). Personal information is collected in accordance with sections 26(a) and 26(c) of the *Freedom of Information and Protection of Privacy Act*. For more information, please review our [Privacy Policy](#).

E-mail address verified. You can now continue.

Change e-mail

Continue



Taking a Closer Look

- Viewing and managing your brokerage information
- Viewing and approving your licensees' renewals
- Renewing your brokerage licence



Profiles and Dashboards: Viewing and Managing Your Brokerage Information

[Click here to watch](#)



Reviewing and Approving Your Licensees' Applications for Renewal

[Click here to watch](#)



Renewing Your Brokerage Licence

[Click here to watch](#)



All Forms Are Now Submitted in IRIS

New Submission

This is a draft submission. You can return to this draft for up to 90 days after expiry, any drafts that have not been edited or submitted will be removed.

Amendments (renewals, transfers, changes)

Sector:

Type:

Search:

Real Estate

Application

Clear

Apply

Sector ↕	Type ↕	Name ↕
Real Estate	Amendment	Amend Brokerage Financial Information Filing
Real Estate	Amendment	Application for licence reinstatement (inoperative more than 90 days within a licence period)
Real Estate	Amendment	Application for licence transfer (currently licensed or inoperative less than 90 days within a licence period)
Real Estate	Amendment	Licence Level or Category Change
Real Estate	Amendment	Name change - Personal Real Estate Corporation
Real Estate	Amendment	Re-Licensing application (unlicensed more than 90 days from licence expiry)
Real Estate	Amendment	Request for Brokerage Name Change
Real Estate	Amendment	Request for Brokerage or Branch Office Category Change
Real Estate	Amendment	Request for Brokerage/Branch office address change
Real Estate	Amendment	Request for Individual Name Change
Real Estate	Amendment	Surrender of a Personal Real Estate Corporation

New Submission

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New Applications

Sector:

Type:

Search:

Real Estate

Application

Clear

Apply

Sector ↕	Type ↕	Name ↕
Real Estate	Application	Application for Brokerage Licence: Corporation or Partnership
Real Estate	Application	Application for Licence: Branch Office
Real Estate	Application	Application for licence: Sole Proprietor
Real Estate	Application	Application for Personal Real Estate Corporation
Real Estate	Application	Application for Representative, Associate or Managing Broker Licence
Real Estate	Application	Application for Secondary Managing Broker Licence
Real Estate	Application	Director, Officer or Partner Information
Real Estate	Application	Request for Brokerage Name Approval
Real Estate	Application	Request for Licensing History for Individual Licensee
Real Estate	Application	Team Name Request

New Submission

This is a draft submission. You can return to this draft for up to 90 days after expiry, any drafts that have not been edited or submitted will be removed.

Terminations

Sector:

Type:

Search:

Real Estate

Termination

Clear

Apply

Sector ↕	Type ↕	Name ↕
Real Estate	Termination	Application for Real Estate Brokerage/Branch Office Surrender
Real Estate	Termination	Application for Real Estate Licence Surrender

New Submission

This is a draft submission. You can return to this draft for up to 90 days after expiry, any drafts that have not been edited or submitted will be removed.

Other Types

Sector:

Type:

Search:

Real Estate

Other

Clear

Apply

Sector ↕	Type ↕	Name ↕
Real Estate	Other	Add an account administrator to my organization
Real Estate	Other	Remove an account administrator from my organization



Resources

- What, Where, When, and Why of IRIS
- How to Navigate IRIS
- Frequently Asked Questions
- How to Contact Us for Support
- IRIS Help & Instructional Videos

Licence renewal letters

Look out for more information about IRIS

- Brokers' Brief
- Future Webinars

Resources and Support

May Webinar – Save the Date

Join us for the next webinar on May 26.

Look out for more information and the registration link in an upcoming Brokers' Brief.

Questions?

Thank
you.