

# IRIS Refresher

## Your New Licensing Platform

November 24, 2022

**BCFSA** BC Financial  
Services Authority

Classification: Protected A



# Agenda

- Welcome and Introductions
- Overview of IRIS
- Walkthrough the IRIS Licensing Platform
- Questions

# Speakers

**BRUCE MCCOUBREY**

Practice Standards  
Advisor

**CHRIS HEALD**

Manager, Solution  
Delivery

# Overview Integrated Regulatory Information System ("IRIS") Platform

# Introducing IRIS

- **What?** a modern customer relationship management (CRM) system
- **When?** Scheduled to launch on January 9, 2023
- **Where?** Accessible via the BCFSA website enabling more efficient, automated submissions, filing, and review processes



# A Single Online Portal

Easier: **streamlined processes** for licensees with the aim of **reducing administrative burden** on managing brokers and their offices

Managing Brokers are better informed and kept in the loop



# Saving Time

## EASIER FOR MANAGING BROKERS

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

You are already used to interaction via a web portal – IRIS expands this functionality





# Meet Your New Licensing Platform

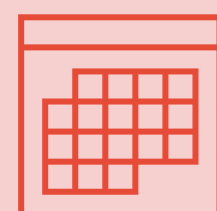
# What's Coming and What's Changing for You?

- 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





**Advise licensees to renew as they normally would and let them know that they will receive notifications**



**Licensees do not need to create their IRIS account before January 9, 2023**




**They must use the email address that is on file with BCFSA – if they are unsure, they can contact the licensing department at [licensing@bcfsa.ca](mailto:licensing@bcfsa.ca)**

# Information for Licensees

# Signing Up and Signing In

What individual licensees will see after successful sign up



[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

**BCPSA**    HOME    NEW SUBMISSION    PAYMENTS    TS LAND -

## Home

Welcome to the BCPSA 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 BCPSA 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-**    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

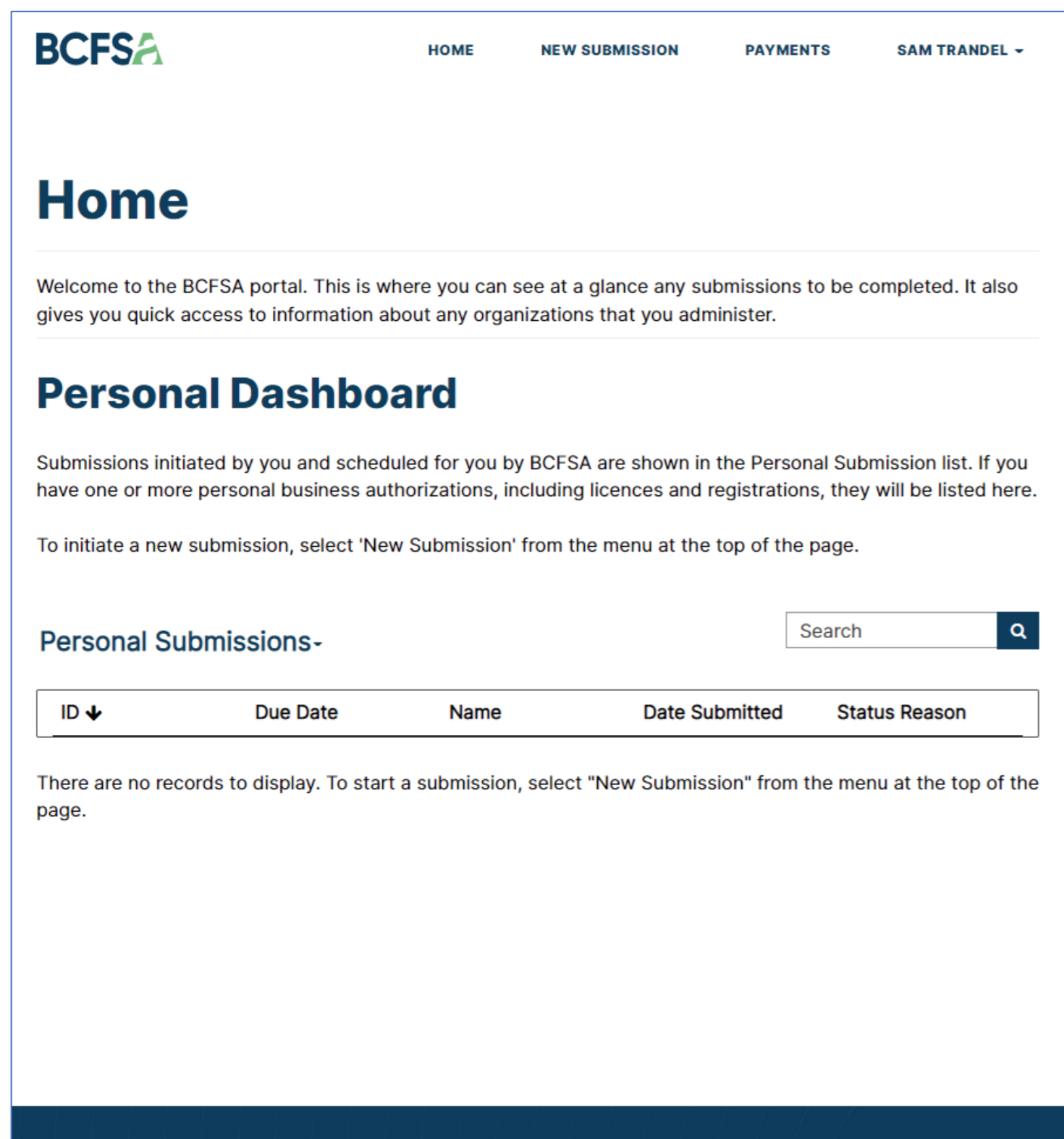


# Troubleshooting if ...

- 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



**BCFSA** HOME NEW SUBMISSION PAYMENTS SAM TRANDEL

## 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 Submissions-

ID ↓	Due Date	Name	Date Submitted	Status Reason
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There are no records to display. To start a submission, select "New Submission" from the menu at the top of the page.

**If you sign up with an email address that is not on file with BCFSA.**

**Solution:  
Try again, sign up with the email address BCFSA has on file.**



# Troubleshooting Tip 2

The screenshot shows the BCFS A portal interface. At the top, there are navigation links: HOME, NEW SUBMISSION, PAYMENTS, and SAM TRANDEL. The main content area is titled 'Home' and includes a welcome message. Below this is a 'Personal Dashboard' section with a table for 'Personal Submissions-'. The table has columns for ID, Due Date, and Name, and currently shows no records. A modal window is overlaid on the page, titled 'Cancel' and 'IRIS Integrated Regulatory Information System'. It contains a list of instructions for password resets and a red warning message: '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 BCFS A systems have not been transferred to IRIS.' Below the warning is a text input field for an email address, followed by 'Change e-mail' and 'Continue' buttons.

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

**Solution: Sign up first with email address on file**

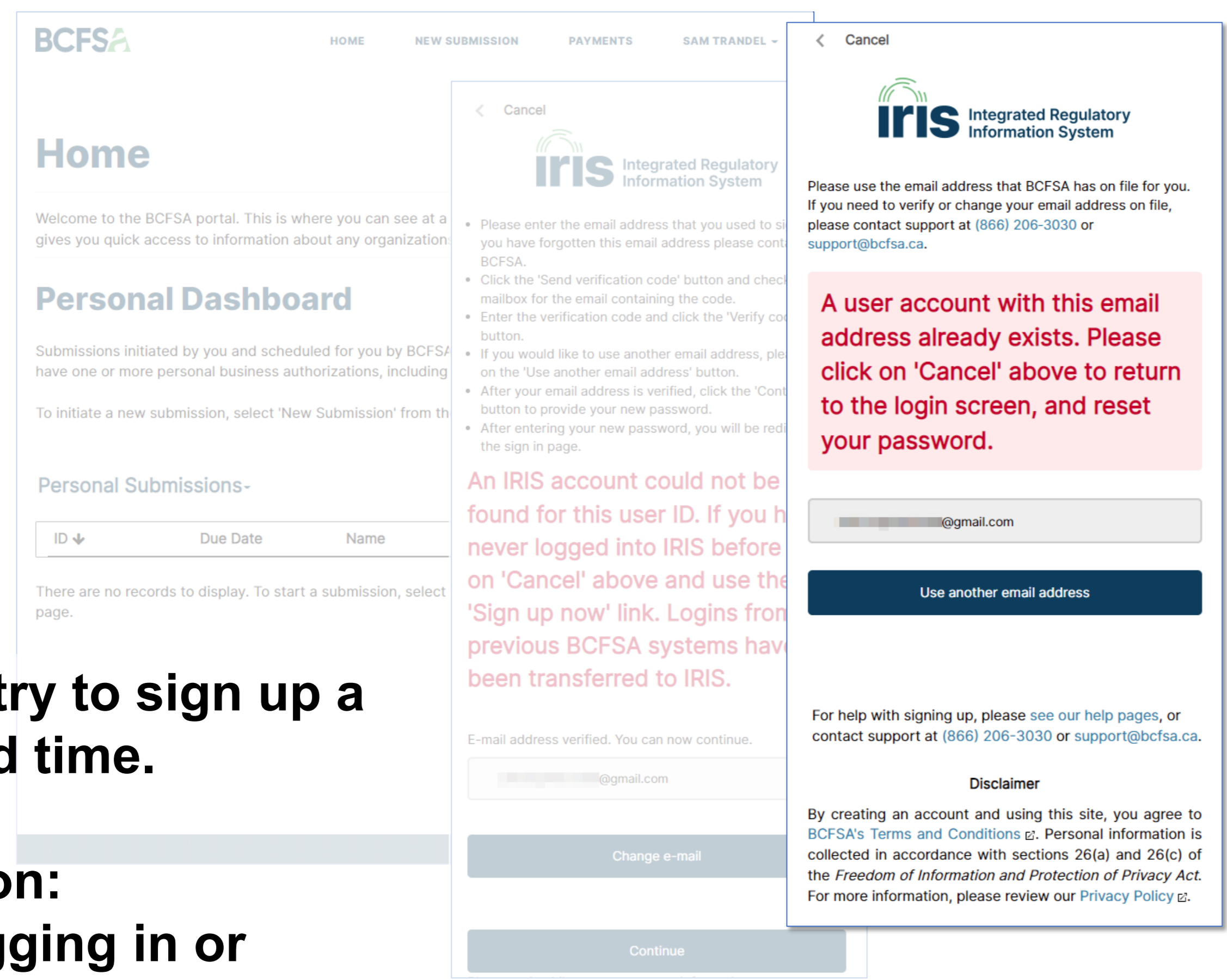




# Troubleshooting Tip 3

If you try to sign up a second time.

**Solution:**  
Try logging in or resetting your password.



The screenshot shows the BCFSAs IRIS system interface. On the left is the 'Home' page with navigation links (HOME, NEW SUBMISSION, PAYMENTS, SAM TRANDEL) and a 'Personal Dashboard' section. The main content area shows an error message in red text: "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 BCFSAs systems have been transferred to IRIS." Below the error message is a text input field containing an email address ending in "@gmail.com" and a "Continue" button. To the right of the error message is a "Cancel" button. Below the error message is a "Use another email address" button. At the bottom of the error message box is a "Disclaimer" section.

**Cancel**

**iris** Integrated Regulatory Information System

Please use the email address that BCFSAs 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.**

@gmail.com

**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 BCFSAs 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.

@gmail.com

**Change e-mail**

**Continue**



# Taking a Closer Look

## THREE SHORT VIDEOS COMING UP

1. Viewing and managing your brokerage information
2. Viewing and approving your licensees' renewals
3. Renewing your brokerage licence

*Please watch these videos in the webinar recording*



# 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 it is created, but drafts that have not been edited or submitted will be removed.

## Amendments (renewals, transfers, changes)

Sector:  Type:  Search:

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:

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 it is created, but drafts that have not been edited or submitted will be removed.

## Other Types

Sector:  Type:  Search:

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

**New Submission**  
This is a draft submission. You can return to this draft for up to 90 days after it is created, but drafts that have not been edited or submitted will be removed.

## Terminations

Sector:  Type:  Search:

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



# What You Can Do to Get Ready

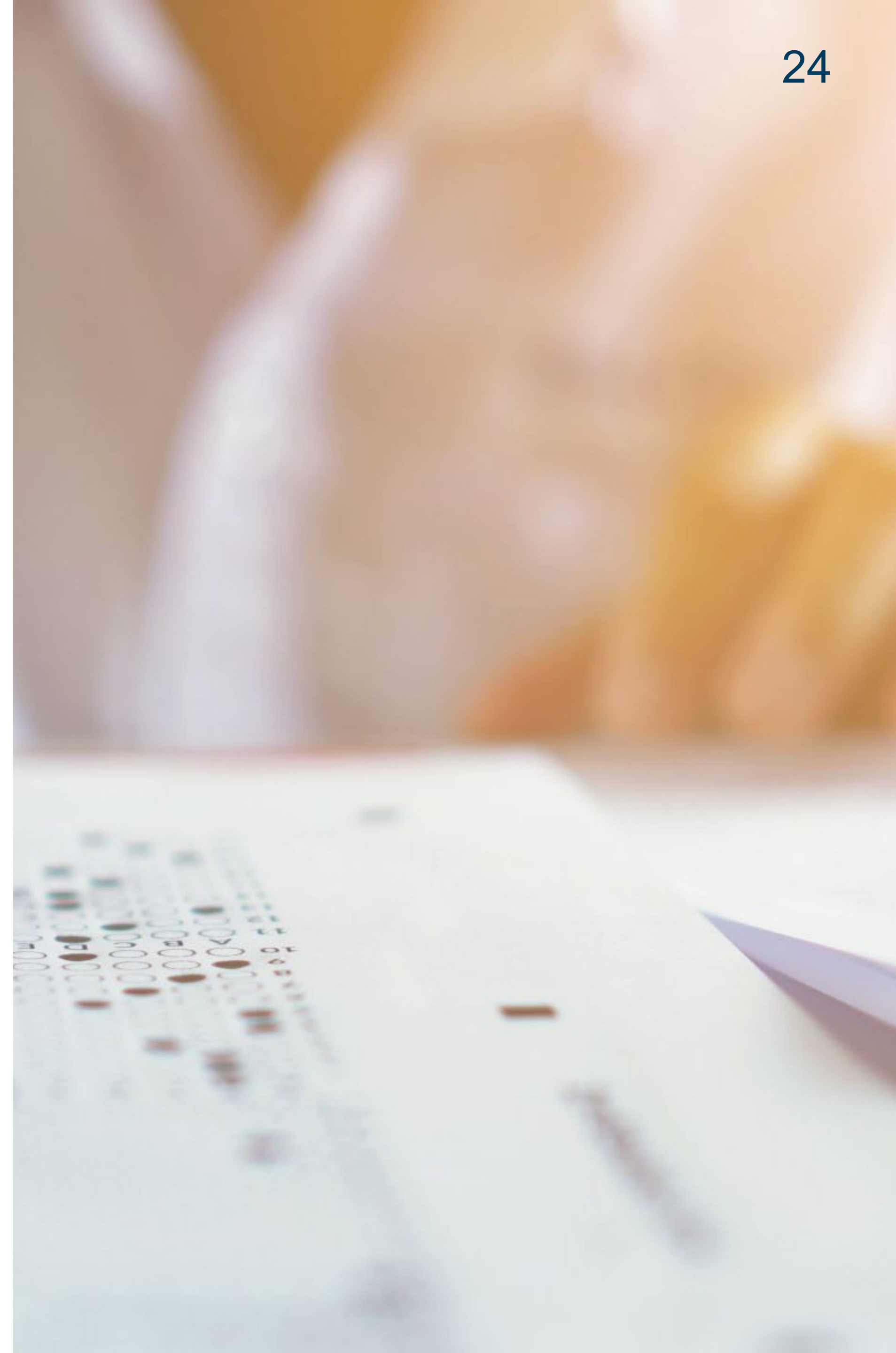
# Things You Can Do Before Launch

## RENEW EARLY

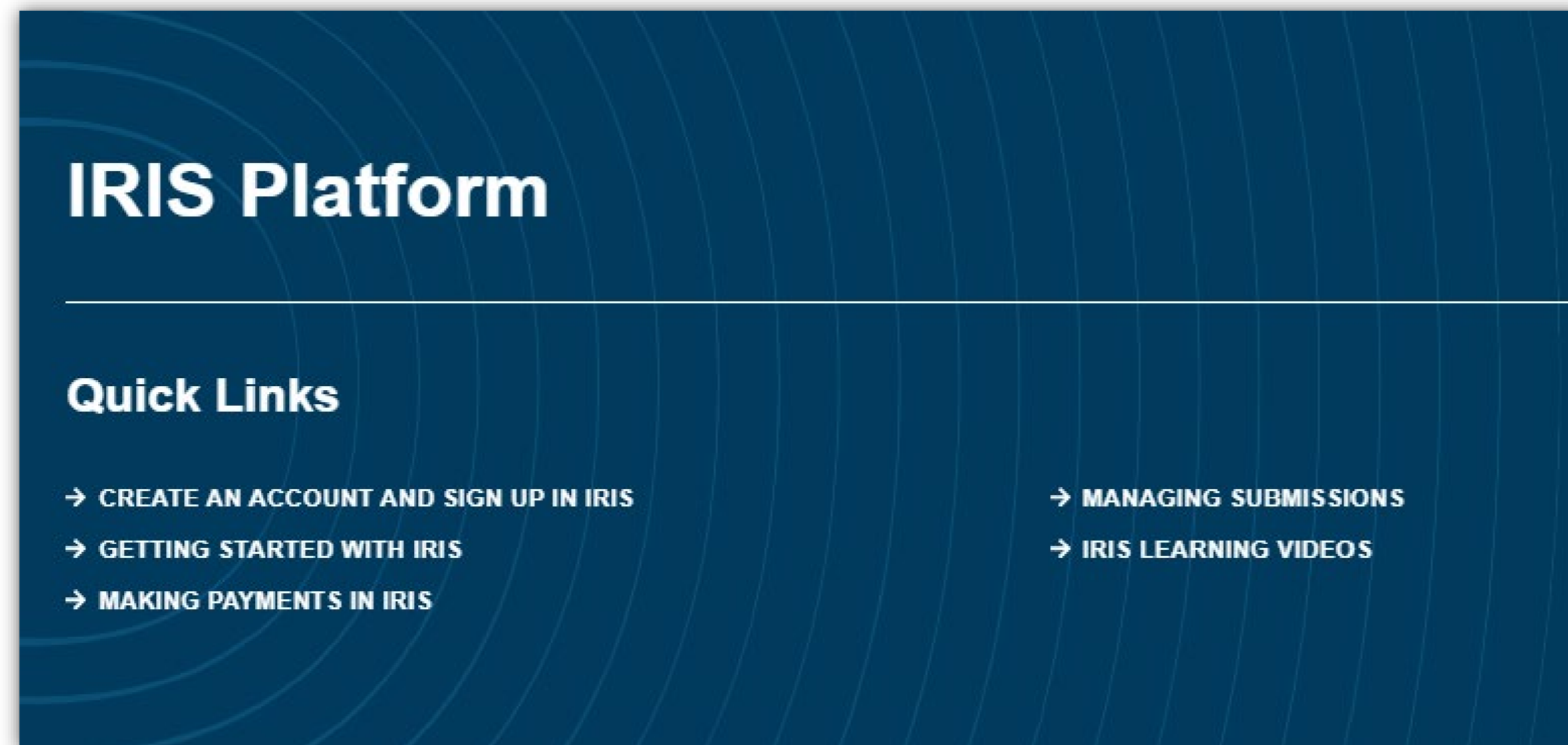
- If your licence is expiring soon, renew promptly through the current portal as you normally do
- Licensees will also need to allow time for their managing broker to review their application

## DOWNLOAD PAST RECEIPTS

- Receipts stored in the current portal will **not** be transferred to IRIS
- Licensees who wish to keep copies of past receipts should log in to the current portal and download them before IRIS launches



# IRIS Page on BCFSA's website



[IRIS Platform | BCFSA](https://www.bcfesa.ca/iris)

# BCFSA's IRIS Portal YouTube Channel



<https://youtu.be/e3gBpDb6tVU>

# Questions?

# Teams Rules Come Into Force on April 1, 2023

## BE PREPARED

Whether you are currently operating as a team or not, you need to understand how the upcoming amendments to Real Estate Services Rules may impact your business.

Visit our website to see the [amended Rules](#) and read the [frequently asked questions](#).

More resources and information will be provided.

**Learn more at the Webinar for Managing Brokers  
Thursday February 23 at 10:00am**

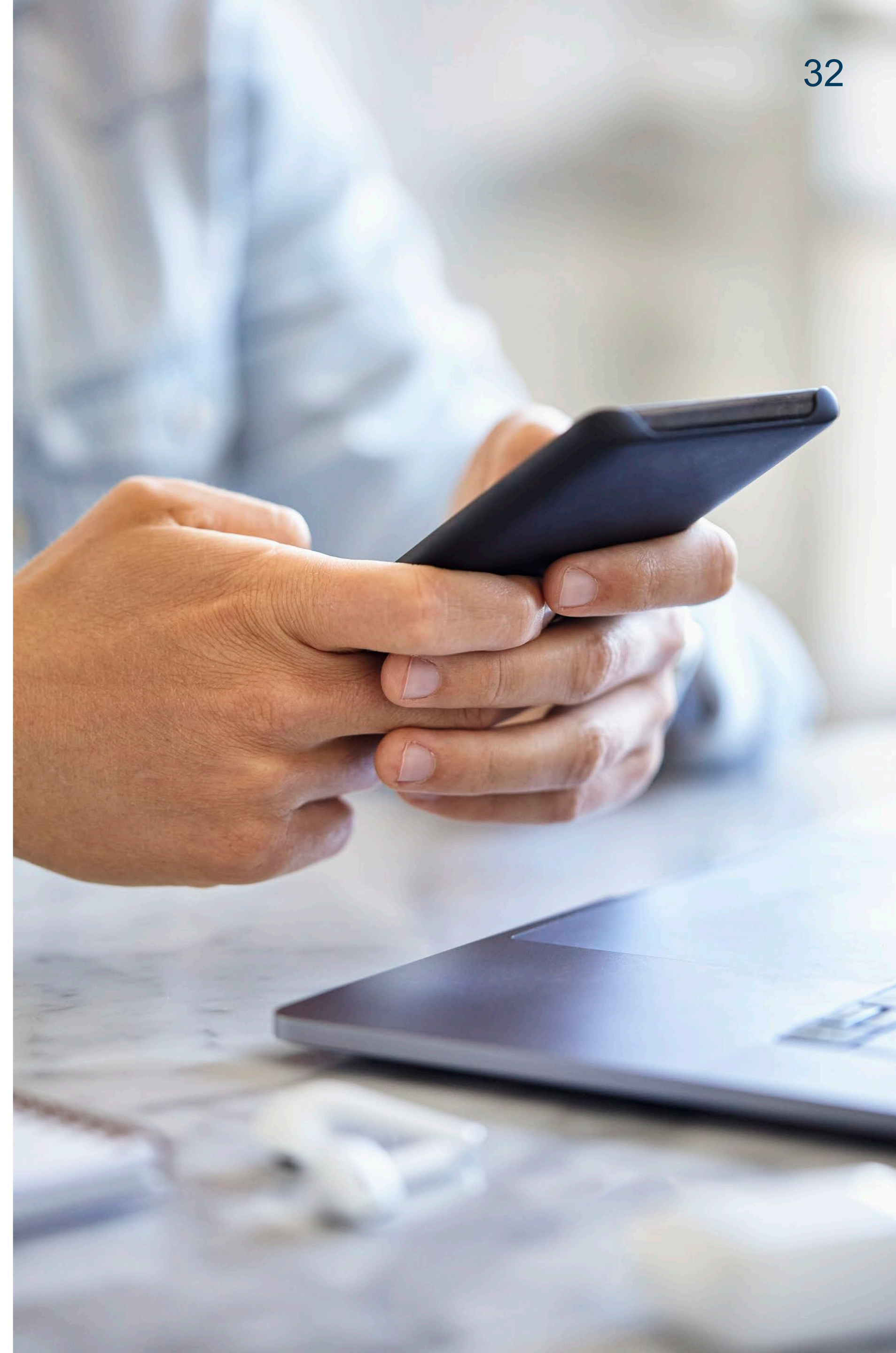




# January Webinar

**SAVE THE DATE, REGISTER AND PARTICIPATE**

- Brokerage Filings: What's New on Thursday January 26.
- Look out for more information and the registration link in an upcoming Brokers' Brief.
- Register for Upcoming Webinars (Winter Series)



# Ongoing Communication and Support

**BCFSA  
Website**

**Brokers  
Brief**

**Real Estate  
Bulletin**

**Practice  
Standards  
Advisors**

**Managing  
Broker  
Webinars**

**Thank  
you.**