

# Zero To Live in 6 Months



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Together we can design our world



# Session Topics

- Merging Three Organizations Databases
- CPA Nova Scotia Website Configurations
  - Committee Pages
  - Events Registration – Passports
  - My CPD Reporting
  - Membership Renewal

# Merging Three Databases

- The Organizations
  - CGA NS (BRO) – Hosted Locally by third party
  - CMA Nova Scotia (iMIS 15) – Hosted by CPA Canada
  - ICANS (iMIS 15) – Hosted by CPA Ontario
- Chose iMIS 20 as this was deemed to be the fastest means to integrate the three databases into one
  - Training time significantly reduced as staff knew iMIS 15 functionality

# Merging Three Databases

- CPA Nova Scotia would have a **new database** – not an upgrade
- Initial discovery Meetings March 29, 2016
  - One week on site design meetings
  - One week on site user acceptance testing
  - Remainder of design, development and testing carried out remotely with Third Party

# Merging Three Databases

- Launched September 15, 2016
- What was ready for day 1?
  - New tables and fields for tracking information (firms)
  - New membership categories for members and firms
  - New Billing products and cycles
  - Data transferred from legacy organizations mapped to new fields
  - Transferred all historical financial transactions from iMIS platforms
  - Events registration, passport purchases and validation
  - Launched new website (basic website launched earlier)
- Used “Forgot Password” functionality to have members create their login credentials

# Merging Three Databases

- Post “Go Live” Development
  - Online committee websites
  - Online CPD Reporting
  - Online Membership Renewal Application

# Committee Pages

- Using RiSE Content Pages accessible only to committee members
- Home page for each committee
  - Displays meeting dates
  - key committee documents
  - listing of committee members
- Each Meeting Date is a separate content page with documents for each meeting

# Events Registration - Passports

- Deliver Approx. 200 CPD courses (Continuing Professional Development courses)
- Members can purchase discounted passports for registration
- Passports use orders module, order number used to register and track passport balance
- Use events module to actually register for courses



# Events Registration - Passports

- Passports = 10 half day credits
  - Event function ending in H (half day) counts as one credit
  - Event function ending in F (full day) counts as two credits
  - Event function ending in 2 (two day) counts as 4 credits
- Custom Script Designed to calculate remaining balance on passport
- Members cannot use more than the balance on the passport

# My CPD Reporting

- Members are required to report CPD activities by calendar year
- Three year rolling period
- 120 total hours of which 60 must be verifiable
- Minimum of 20 in any year of which must be 10 Verifiable

# Membership Renewal

- Members are required to apply for annual renewal
- Renewal Application
  - Updates to information
  - Public Practice Information
  - Annual Declarations
  - Apply for a waiver or pay annual fees

# Tips for Success

- Tips for success
  - Document the must have's
  - Inventory your teams qualifications
  - Use the iMIS Community
  - Be Flexible

# Thank You

- Any Questions?



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