
GUIDE TO MEMBER RENEWAL



CPA

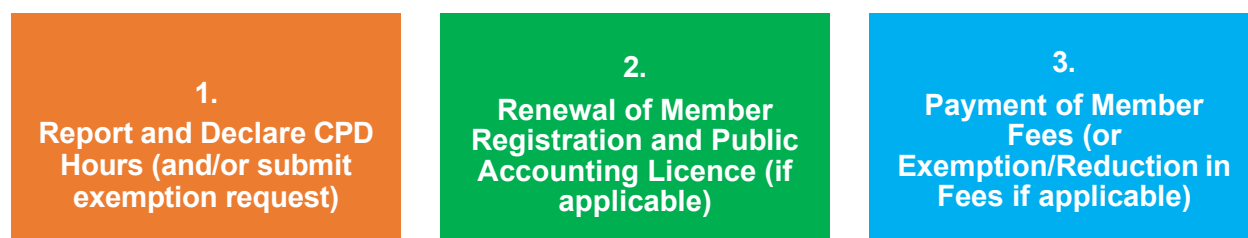
CHARTERED
PROFESSIONAL
ACCOUNTANTS
NOVA SCOTIA

Published: February 2024

WHY IS MEMBERSHIP RENEWAL REQUIRED?

The registration of each member is valid from the date of registration to the 31st day of March annually. All member registrations must be renewed annually in accordance with By-Law 226. In addition, any member seeking to renew their public accounting licence must apply annually on or before March 31st in accordance with By-Law 368.

Annually, Membership Renewal involves:



WHAT ARE THE DATES TO KNOW?

February 2024	Renewal notices sent to all registered members via email. Renewal will require you to report and declare all of your CPD for the prior calendar year and apply for a renewal of your public accounting licence, if applicable. If you are a firm representative, you will receive a separate notice for renewal of your firm's registration (does not include PLI).
Mid-March 2024	Reminder notice(s)
March 31, 2024	Final deadline for member renewal, including CPD reporting and public accounting licence renewal, if applicable.
April 2, 2024	Suspension warning issued - deadline to complete CPD, member and public accounting licence renewal (if applicable) and pay fees has passed. Members have until April 30 th to complete the renewal until they are suspended from membership. This is also the final deadline to complete firm registration renewals (see Guide for Firm Renewal).
May 1, 2024	Suspensions issued and suspension fee applied
May 31, 2024	Last date to apply to have a suspension lifted.
June 3, 2024	Revocations issued and readmission fee applied.

WHAT IS REQUIRED OF THE MEMBER?

Before Logging In

The following items will be required in order to complete your membership and public accounting licence renewal (if applicable):

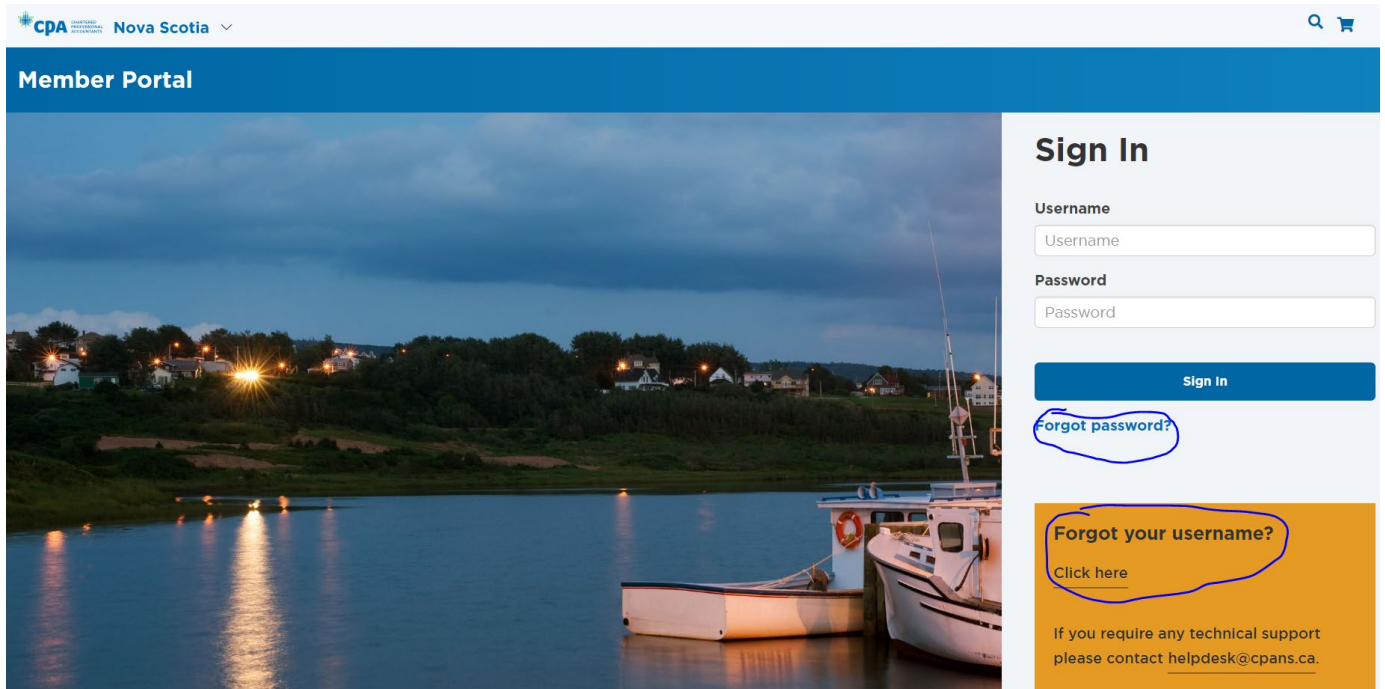
1. Your record of CPD hours/activities undertaken during the prior calendar year, if not already entered on your member account.	<input type="checkbox"/>
2. Your employment information, if it has changed and has not been updated since the previous renewal or throughout the year.	<input type="checkbox"/>
3. Your residential address if it has changed and has not been updated since the previous renewal or throughout the year.	<input type="checkbox"/>
4. If renewing a public accounting licence, details of your relevant hours for the last 5-year period. For an Audit Licence, the hours must be in the audit of historical financial information. For a Review Licence, the hours must be in the assurance of historical financial information.	<input type="checkbox"/>
4. Your payment details if paying by credit card.	<input type="checkbox"/>

Setting up your password for the first time

1. From the CPA Nova Scotia website [home page](#), click the green button “Member Portal”:



2. If you have forgotten either or both your username and/or password, click on the “Forgot password?” link under the Username and/or Password boxes:



3. Enter your **email address** in the Forgot Password box and click ‘**Submit**’. Your username is always your preferred email address with CPA Nova Scotia.

Passwords must be a minimum of 10 characters with at least 1 letter and 1 number.

If you do not receive the password reset email after 20 minutes or have any technical issues, please contact helpdesk@cpans.ca.

HOW IS MEMBERSHIP RENEWAL COMPLETED?

After Logging In

You will be taken to the landing page that displays a Progress Bar.

1. Report and Declare CPD Hours

The screenshot shows the Member Portal for Mr. Joe Waterfront, CPA, CMA. The user's profile information is displayed, including their name, title (Vice President Finance), company (Atlantica Contractors), and contact details. Below the profile is a progress bar titled "Time to Renew Your Membership". The progress bar consists of five steps: 0% Completed, Confirm your annual CPD compliance (highlighted with a red box), Submit Member Renewal, Pay My Fees, and Renewal Complete. A text box above the progress bar states: "The deadline to renew your membership, confirm your annual CPD compliance, submit your annual declarations, and pay your membership dues and other fees is March 31."

- Click on **Confirm your annual CPD compliance** on the Progress Bar. Add all CPD activities undertaken during the previous calendar year in the CPD reporting tool (please refer to the [Guide for CPD Reporting Tool](#) for more information if required)
- Once all CPD activities have been entered, click on **Annual CPD Declaration** in the green alert box.

Step 1: Submit your Annual CPD Declaration

Members are required to declare compliance with CPD requirements. If you have not met the minimum CPD requirements, you will be required to submit a declaration of non-compliance and action plan to become compliant.

Annual CPD Declaration

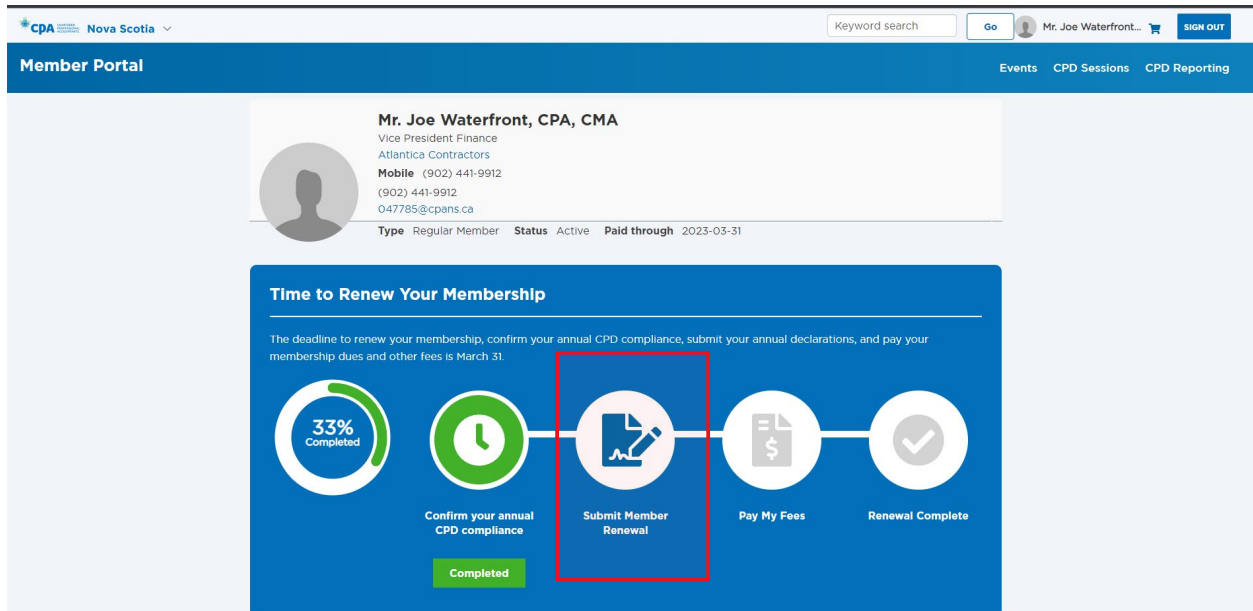
Should you qualify for an exemption, complete the CPD Exemption Request.

[CPD Exemption Request](#)

- Once you have declared your CPD, you will be taken back to the Progress Bar.
- If you need to request a CPD Exemption for the prior calendar year, click on "CPD Exemption Request" link in the green alert box and follow the steps.
- If you have a deficiency of any kind, you will still be required to submit the declaration(s). They will default to

the correct statements, and you will not be able to change them. Submission of the declaration(s) will meet the requirement to report, regardless of whether you have a deficiency, which will be addressed separately. Please refer to the [Simple Guide to CPD Reporting](#) for more information.

2. Submit Member Renewal



Step 1 – Member Information

- Click on **Submit Member Renewal** on the Progress Bar. You may click the “Cancel” button to leave the Member Renewal form or click “Next” to proceed.
- The first step is *Member Information*. Review or edit your contact information, employment information, and residential address as necessary.

Step 2 – Declaration of Compliance

- The second step is *Declaration of Compliance*. If you answer ‘Yes’ to any of these questions, you will be required to provide additional information in the area provided.

Step 3 – Exemptions/Reductions (if applicable)

- The third step is *Fee Exemption/Reduction Request*. For more information, please refer to the [Dues Waiver/Reduction Policy](#). If you require an exemption, please select “I want to request a fee exemption” in the drop-down box. You will also have to agree that your projected active income for the current calendar year will be less than \$5,000.
- There are several types of fee **exemptions** available:
 - Retirement – over age 55, no intention of returning to the workforce
 - Education Leave – members in **full-time** attendance in a degree program at a recognized university or college
 - Caregiving (including maternity/parental leave, long-term parenting, caregiving leave) – out of the workforce and meet the active income requirement of less than \$5,000

- Medical – either temporary or permanent and meet the active income limit
- Financial Hardship – any situations that do not fall within one of the above categories must be applied for as financial hardship.

- **NOTE:** CPD exemptions are separate and apart from dues waivers or reductions and must be applied for separately.

- If you will require a fee **reduction**, you must select “I want to request a fee reduction” from the drop-down box. You will also have to agree that your projected active income for the current calendar year will be more than \$5,000 but less than \$25,000.
- There several types of **fee reductions**:
 - Part-time or Contract Employment – currently employed on a part-time or contract basis and meet active income requirements.
 - Education Leave – members out of the workforce and enrolled in a degree program at a recognized university or college and meet the active income requirements
 - Caregiving (including maternity/parental leave, long-term parenting, caregiving leave) - out of the workforce and meet the active income requirement of less more than \$5,0000 but less than \$25,000
 - Medical - either temporary or permanent and meet the active income limit
 - Financial Hardship - any situations that do not fall within one of the above categories must be applied for as financial hardship.

Step 4 – Public Accounting Licence (if you do not currently have one, this will not display)

- You must indicate yes or no if you wish to renew your current licence or if you wish to downgrade from Audit to Review Licence. If you wish to upgrade your licence, you will be required to contact our regulatory department at registrations@cpans.ca.
- You will have to indicate the level of licence you wish to renew (or downgrade to) as well as indicate if and where you hold a licence to practice in other jurisdictions, and whether or not you are a partner in a firm.

Step 5 - Service to the Public

- The next set of questions are with regard to *Service to the Public*. If you are employed at a registered firm, the first question will be defaulted to ‘Yes’. If you are not employed at a registered firm but provide services to the public outside of your main employment, you will be required to answer “yes” to the subsequent question.

Step 6 – Partner/Owner

- If you have indicated you are a partner in a firm, you must enter the firm information here.

Step 7 – Eligible Practice Experience Hours

- At a minimum, you will be required to enter relevant hours for the past 24-month period (2022 and 2023). Where hours are missing for prior years (depending on when/how you received your original licence), you will also be required to enter those hours.

Year	Audit Hours	Other Assurance	Review Hours	Agreed Upon Procedures Engagements	Compilation Hours
2019	1670		45		
2020	1625			30	
2021	1655		50	15	
2022	1585		80	45	
2023					
Subtotal Hours	Audit Total 6535.00	Other Total 0.00	Review Total 175.00	Procedures Engagements Total 90.00	Compilation Total 0.00
5 Year Total Hours	6710.00				

- If you have not met the minimum hours requirements for renewal of your licence, you will have to indicate whether or not you want to apply for discretion in considering your application. You must enter any verifiable CPD hours related to audit and/or review for consideration by the Public Accounting Licensing Committee and any other pertinent information:

⚠ You have not met the hour requirements for renewal of your public accounting licence. Would you like to apply for Committee discretion in considering your application? *

Yes No

Verifiable CPD hours directly related to Audit

Verifiable CPD hours directly related to Review

Other Pertinent Information:

Step 8 – Declaration

- You must select each checkbox here to indicate your consent to have the information released in accordance with CPA Nova Scotia’s privacy policy.

Step 9 – Volunteer

- You will be able to indicate your interest in volunteering with CPA Nova Scotia (or not) and selecting on which Committee(s) you wish to serve (select all that apply)

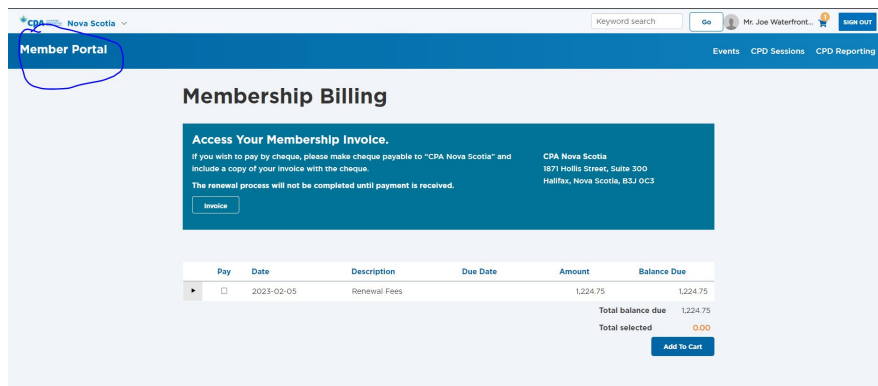
Step 9 – Final Declaration

- You must select each checkbox here to indicate your concurrence with the renewal declaration.
- Type your full name in the box indicated.
- Click on **Proceed to Member Fees**.

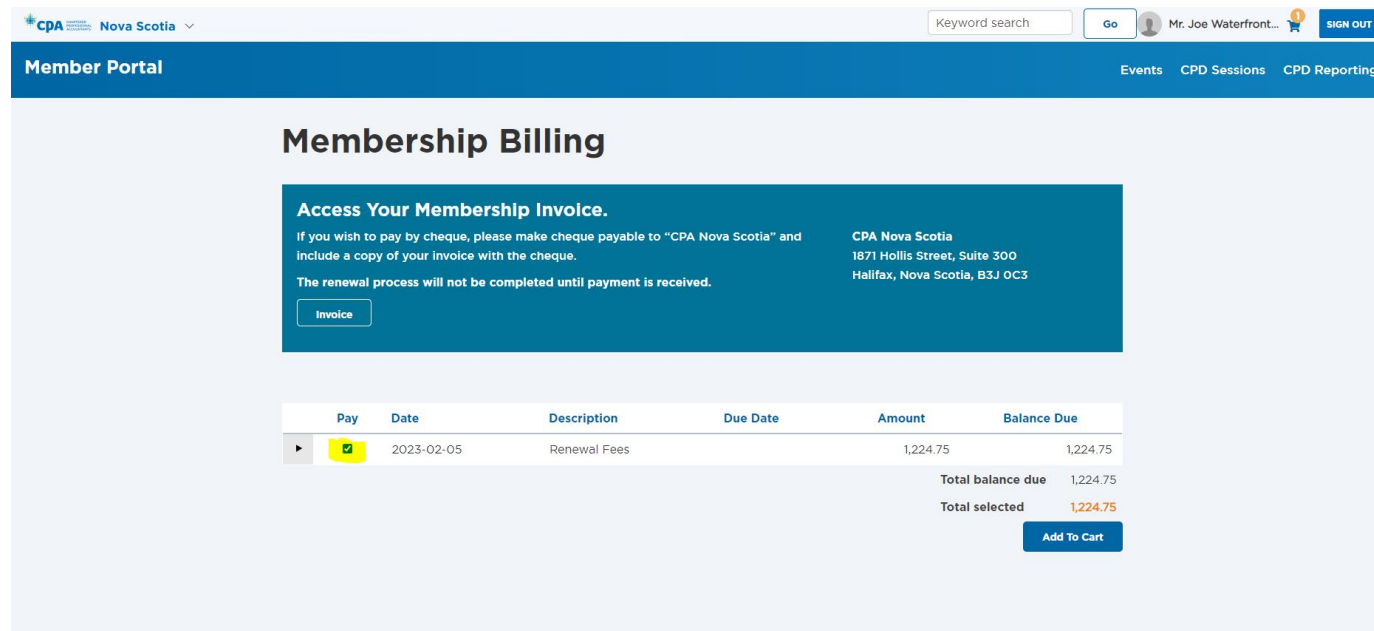
3. Membership Fees

Step 11 – Fees Payment

- Here you will be able to access your invoice to print and send to your employer for payment or you can add the items to your cart and pay online.
- If you opt to print your invoice and your employer will be sending payment, you will have to click on “Member Portal” to return to the main screen:



- If you opt to pay online, you must click the box under “Pay” and then “Add to Cart”. If you requested a waiver or reduction, the fees will be adjusted accordingly.



- If you want to see a breakdown of the fees, click the arrow beside the check box:

Membership Billing

Access Your Membership Invoice.

If you wish to pay by cheque, please make cheque payable to "CPA Nova Scotia" and include a copy of your invoice with the cheque.

The renewal process will not be completed until payment is received.

CPA Nova Scotia
1871 Hollis Street, Suite 300
Halifax, Nova Scotia, B3J 0C3

[Invoice](#)

Pay	Date	Description	Due Date	Amount	Balance Due
<input type="checkbox"/>	2024-01-24	Renewal Fees		1,500.75	1,500.75
		Item		Amount	
		CPA National Fee (2024-04-01 to 2025-03-31)		400.00	
		CPA Public Accounting Licence (2024-04-01 to 2025-03-31)		80.00	
		CPA Provincial Fee (2024-04-01 to 2025-03-31)		665.00	
		HST		195.75	
		CPA Public Practice Fee (2024-04-01 to 2025-03-31)		160.00	
				Total balance due	1,500.75
				Total selected	0.00

[Add To Cart](#)



If you have completed all of the requirements, your Progress Bar will show 100% Completed.

CPA Nova Scotia

Member Portal

Time to Renew Your Membership

The deadline to renew your membership, confirm your annual CPD compliance, submit your annual declarations, and pay your membership dues and other fees is March 31.

- 100% Completed
- Confirm your annual CPD compliance (Completed)
- Submit Member Renewal (Completed)
- Pay My Fees (Completed)
- Renewal Complete (Completed)

You will also see an Order Confirmation below that you can print for your records:

Order Confirmation

Print Page

CPA CHARTERED PROFESSIONAL ACCOUNTANTS NOVA SCOTIA
CPA Nova Scotia
1871 Hollis Street, Suite 300 Halifax, Nova Scotia, B3J 0C3

Order date February 5, 2023
Payment method Check Number: 1222
Sold to Mr. Joe Waterfront, CPA, CMA
15 Bramwell Court
Bedford, NS B4B 0W2
CANADA

Item	Quantity	Price	Total
Invoice Cash-52534: Renewal Fees - Mr. Joe Waterfront, CPA, CMA	1	1,224.75	1,224.75
Invoice total			1,224.75
TRANSACTION GRAND TOTAL			1,224.75
Payment amount			1,224.75
Balance due			0.00

- Click on **Pay My Fees** on the Progress Bar. Review your membership fees to ensure they are correct. Click on “Proceed to Payment” to go to the cart.
- To obtain an invoice, follow the instructions as indicated in Step 11 – Fees Payment above.

Registration Fees	CPA NS Fee	CPA Canada Fee	HST*	TOTAL
Regular Member Fee	\$665.00	\$400.00	\$159.75	\$1,224.75
Non-Resident Member Fee	\$280.00	\$0.00	\$42.00	\$322.00
Service to the Public Fee	\$160.00	\$0.00	\$24.00	\$184.00
Public Accounting Licence Fee	\$80.00	\$0.00	\$12.00	\$92.00
Out of Country Member Fee	\$250.00	\$325.00	\$0.00	\$575.00

*HST is charged based on province of residence; if you live outside of Canada, HST is charged at the Nova Scotia rate.

Regular Member applies to all members who:

- Reside in the Province of Nova Scotia; or
- Reside in another province and do not hold a regular (or equivalent) membership with another CPA Canada body

Regular members are assessed the full annual provincial and national CPA membership fees unless they qualify for an exemption, reduction, non-resident, or out-of-country fees.

Service to the Public Fee – will be charged to those Regular Members who are employed with a firm offering services to the public or have their own firm offering services to the public outside of their main employment.

Public Accounting Licence Fee – those members who are applying to renew their public accounting licence will be charge this fee.

Non-Resident Member applies to all members who maintain a Regular Member status or equivalent in another CPA Canada body. Such members will be charged the Non-Resident Member Fee.

Out of Country applies to members whose permanent residence is outside of Canada and will be assessed reduced provincial and national dues.



Member renewal is considered complete when all required steps of the renewal are submitted, and payment is received. Your Progress Bar will show 100% Completed when finished.

The screenshot shows the 'Member Portal' for CPA Nova Scotia. The main content area is titled 'Time to Renew Your Membership' and includes a progress bar with five steps: '100% Completed', 'Confirm your annual CPD compliance', 'Submit Member Renewal', 'Pay My Fees', and 'Renewal Complete'. Each step has a corresponding icon and a 'Completed' button below it. The 'Renewal Complete' step is highlighted with a red box, indicating it is the final and completed step.

All information submitted to CPA Nova Scotia in support of an exemption is subject to verification or request to provide additional information at the time of renewal.

Your Progress Bar will show 100% Completed when finished.

Time To Renew Your Membership Registration

The deadline to submit your CPD declaration, member renewal declaration and pay member registration fees is April 15, 2022.
Late fees may be assessed by May 15, 2022.

The progress bar consists of five circular icons connected by a horizontal line. The first icon is a green circle with a white border containing the text '100% Completed'. The second icon is a green circle with a white border containing a clock icon. The third icon is a green circle with a white border containing a document icon with a pencil. The fourth icon is a green circle with a white border containing a document icon with a dollar sign. The fifth icon is a white circle with a green border containing a green checkmark. Below each icon is a label and a green 'Completed' button. The fifth step, 'Renewal Complete', is enclosed in a red rectangular box.

Step	Label	Status
1	100% Completed	Completed
2	Report and Declare CPD Hours	Completed
3	Submit Member Renewal	Completed
4	Registration Fees	Completed
5	Renewal Complete	Completed



Need help?

Contact info@cpans.ca or call (902) 425-7273

