

WELCOME TO ICEREG

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ABOUT THIS DOCUMENT

Content

This document is an introduction package on Speed Skating Canada's online membership and events management platform, IceReg.

Definitions

The following terms are applicable within this document:

- SSC: Speed Skating Canada
- **<u>PTSO</u>**: Provincial or Territorial Sport Organization. As an example, British Columbia's provincial sport organization is Speed Skating BC (SSBC).

WHAT IS ICEREG?

IceReg is SSC's online membership and events management platform.

IceReg is powered by <u>Interpodia</u>, a technology and online solutions provider that has worked alongside sport organizations since 2009. Interpodia is headquartered in Vancouver, British Columbia. <u>Click here</u> for information on Interpodia's technology and PCI compliance.

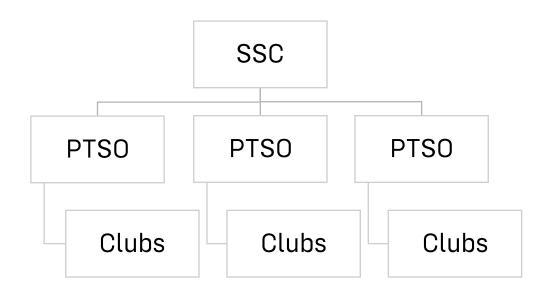
IceReg has two (2) pillars:



MEMBERSHIP Registration

Three Tiers

The membership registration pillar has three (3) tiers consisting of SSC memberships (top tier), PTSO memberships (middle tier), and club programs (bottom tier).



Each organization (tier) can collect information from registrants and use the information within the parameters of privacy law. Information collected by SSC is available <u>here</u>. SSC's privacy policy can be consulted <u>here</u> and Interpodia's privacy policy can be consulted <u>here</u>.

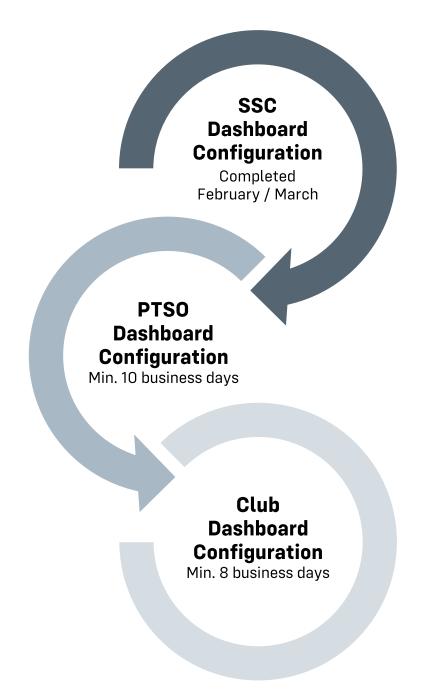
The membership registration pillar is configured with a business logic that allows registrants to register for multiple memberships in a single season while only charging the most expensive membership fee. In cases where a registrant has purchased multiple memberships, IceReg will assign the registrant a **primary membership** and a **secondary membership(s)** per SSC's membership hierarchy.

IMPORTANT – IceReg works best when participants register themselves, and therefore the use of **bulk uploads** is only available on a case-by-case basis. Note there is an additional fee to execute a bulk upload.

Annual Onboarding

To ensure membership registration data is properly partitioned, the membership registration pillar must be configured anew each season. This involves three (3) separate onboarding phases which must be executed in order: the SSC dashboard is configured first, followed by a PTSO dashboard, and then a club dashboard.

IMPORTANT – Onboarding timeline may vary by PTSO / region and clubs can contact their PTSO for more information. Each season, PTSOs shall provide their clubs with the set-up steps for a new club dashboard and these set-up steps must be followed for a new club dashboard to be approved.



Registration Pathways

To manage membership registration, a club must choose a **registration pathway**. A registration pathway refers to the purchasing options (memberships, club programs) presented to a registrant in IceReg.

There are **two (2) registration pathways** and clubs can select the registration pathway that best suits their operational needs. Note a registration pathway cannot be changed once a club opens membership registration to the public.

The table below summarizes each registration pathway. Detailed configuration information on each registration pathway is available in the <u>IceReg folder</u> of SSC's resource library.

	REGISTRATION PATHWAY 1 Memberships and Club Programs	<u>REGISTRATION PATHWAY 2</u> Memberships ONLY
What does a registrant purchase in IceReg?	Registrant purchases a SSC membership, a PTSO membership, and a club program.	Registrant purchases a SSC membership and a PTSO membership only .
Are any processing fees charged to the club?	Yes, processing fees apply to club level fees. <u>Click here</u> for the fee structure table.	Νο
What payment methods are available to the purchaser?	Purchases should be completed using a credit card (Visa, Mastercard, Amex, Discover, Visa Debit, and Mastercard Debit).	Option 1 – Credit card payments only (Visa, Mastercard, Amex, Discover, Visa Debit, and Mastercard Debit). Option 2 – Offline payments
	What if our club needs a payment group to accept some offline payments? For special circumstances (ex., JumpStart, KidSport, or a club chooses to absorb the membership fees for officials and / or coaches), a club can contact info@icereg.ca to request a payment group for the purposes of tracking offline payments for SSC membership fees and PTSO membership fees. Before requesting a payment group, clubs are strongly encouraged to learn about basic payment group functionality here and to consult the information package on	(payment group). Note all purchasers will be presented with the credit card payment option and the offline payment option (payment group) simultaneously. <u>Click here</u> for more information on payment groups.

	Registration Pathway 1 for configuration considerations.	
How are credit card payments processed?	A payment submitted by credit card is split; amounts owing to SSC, the PTSO, and the club are electronically deposited into each organization's respective banking account. To receive credit card payment deposits electronically, a club must set-up and maintain a 3 rd party payment processing account with either Chase WePay or Stripe . <u>Click</u> <u>here</u> for information on payment processing accounts. A club must also decide how to administer the Credit Card	A payment submitted by credit card is split; amounts owing to SSC and the PTSO are electronically deposited into each organization's respective banking account. Clubs using this registration pathway do not need a payment processing account, as the club's registration categories will be configured with a \$0.00 fee.
	Processing Fee and the Interpodia System Fee . <u>Click here</u> for the fee structure table.	
How are offline payments (cash, cheque, EFT) processed?	Go to section: <u>What payment</u> <u>methods are available to the</u> <u>purchaser?</u>	Offline payments for SSC membership fees and PTSO membership fees are tracked in a payment group. <u>Click here</u> for more information on payment groups.
Can a club add their own club level waivers?	Yes	Yes
Can a club add questions to the registration form?	Yes	Yes
Can a club create and manage events?	Yes	Yes, if a club has a Chase WePay or Stripe account.
Can a club offer the payment by installment	Yes. See the information package on <u>Registration Pathway 1</u> for important information on payments by installment.	Νο

option for their club level fees?		
Can a club create discounts and coupon codes for club level fees?	Yes	No
Can a club use an online store?	Yes	Yes, if a club has a Chase WePay or Stripe account.
Can a club create and manage Try Speed Skating events?	Yes	Yes

Try Speed Skating

SSC's **Try Speed Skating** event membership has a separate configuration and registration process in IceReg. To create a Try Speed Skating event in IceReg, please follow the steps in <u>this Knowledge Base article</u>.

CLUB DASHBOARD OVERVIEW

Administrators

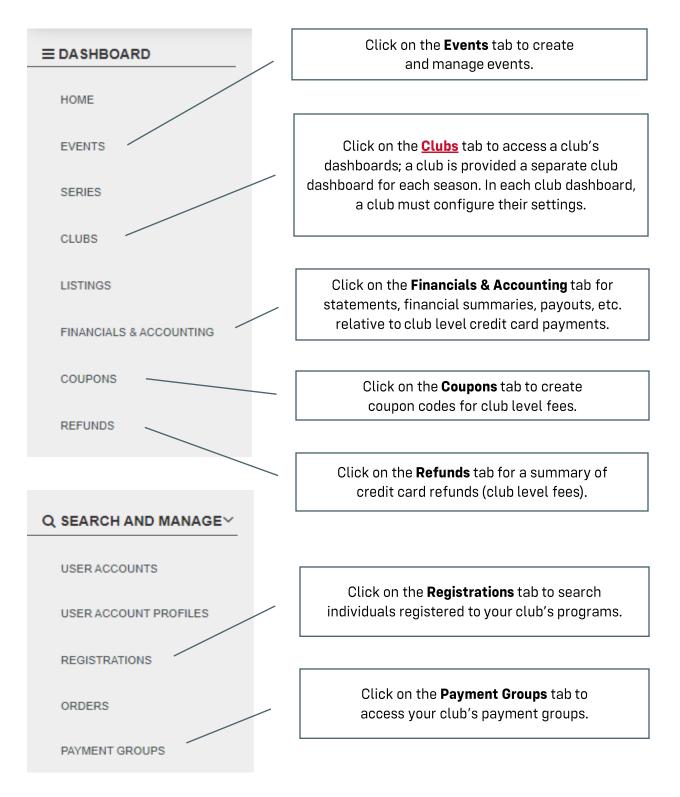
Only administrators can access a club dashboard. Administrator permissions can be added to an IceReg account <u>by an existing administrator</u> or by contacting <u>info@icereg.ca</u>. Once administrator permissions are successfully added to an IceReg account, login to IceReg and click **Dashboard**.

Note club data is partitioned (clubs cannot access data from other clubs). Clubs are strongly advised to regularly audit the administrator permissions granted to their club dashboard and remove unneeded permissions.



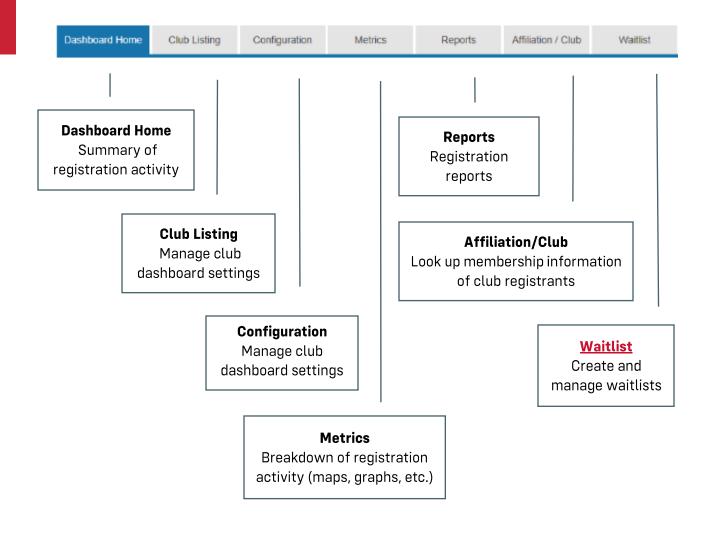
Main Menu

The main menu of a club dashboard is located on the left side of the screen. See diagrams below for basic information on key tabs:



The Clubs Tab

A club's dashboards (a club is provided a separate club dashboard for each season) are accessible via the **Clubs** tab. Each club dashboard features the following sub-tabs/sections:



If the sub-tabs/sections are not immediately visible, click on the three (3) horizontal bars:



CREDIT CARD PAYMENTS

Payment Processors

To receive credit card payment deposits electronically, an organization must set-up and maintain a 3rd party payment processing account with either **Chase WePay** or **Stripe**. A club's payment processing account must be set-up and approved before credit card payments can be processed in IceReg.

	CHASE WEPAY	STRIPE
Important things to know	Chase WePay does not recognize a P.O. box as a valid address.	 Stripe can create accounts for organizations with a P.O. box address. There is a one-time fee of \$60.00 +tx to move from a Chase WePay account to a Stripe account.
Options for administering the Credit Card Processing	Option 1 - Credit Card Processing Fee and Interpodia System Fee are charged to the purchaser. Option 2 - Credit Card Processing	Option 1 - Credit Card Processing Fee is absorbed by the organization (deducted from the deposits), and the Interpodia System Fee is charged to the purchaser.
Fee and the Interpodia System Fee.	Fee and Interpodia System Fee are absorbed by the organization (deducted from the deposits). Click here for the fee structure	Option 2 - Credit Card Processing Fee and Interpodia System Fee are absorbed by the organization (deducted from the deposits).
	table.	<u>Click here</u> for the fee structure table.
Opening an account	<u>Click here</u> for information on opening a Chase WePay account.	<u>Click here</u> for information on opening a Stripe account.
Closing an account	<u>Click here</u> for information on closing a Chase WePay account.	<u>Click here</u> for information on closing a Stripe account.
Additional Support	<u>Click here</u> for additional information and support on Chase WePay accounts.	<u>Click here</u> for additional information and support on Stripe accounts.

Financial Reporting

Click on the **Financials & Accounting** tab (main menu) for statements, financial summaries, payouts, etc. relative to club level credit card payments.

Within each separate club dashboard, additional financial reports are available in the **Reports** sub-tab.

OFFLINE PAYMENTS & Payment Groups

Payment Groups

A **payment group** is an offline payment tracker that allows clubs to track membership fees owing to SSC and the PTSO. Registrants needing to pay via a payment group simply complete their registration in IceReg (select the payment group option) and the club collects all fees owing outside of IceReg by cash, cheque, or EFT.

<u>To keep in mind</u>

- Maximum of one (1) payment group, per club, per season.
- Payment groups only track membership fees owing to SSC and the PTSO; payment groups no longer track club level fees.
- Wherever possible, registrations being paid offline (payment group) should be executed separately from registrations being paid by credit card.
- In most cases, using a payment group requires all purchasers to be presented with both the credit card payment option and the offline payment option (payment group) simultaneously.

Frequently Asked Questions

How does a club set-up a payment group? Payment groups are set-up by the IceReg support team (<u>info@icereg.ca</u>). A club can request a payment group within their annual IceReg configuration form or by contacting <u>info@icereg.ca</u>.

Where does a club access their payment group? Clubs can access their payment group information, invoices, reports, etc. in the **Payment Groups** tab (main menu).

Can a registrant's access to the payment group option be controlled using a passphrase? Yes, a passphrase can be configured in the **Payment Groups** tab (main menu).

Is there a cost to use a payment group? There is no cost to a club to use a payment group that tracks SSC membership fees and PTSO membership fees.

End-of-Season Invoicing

- A club is invoiced by their PTSO for SSC membership fees and PTSO membership fees owing in the payment group.
- SSC validates all payment groups in IceReg at the end of the season (April). Once the validation process is complete, SSC and the PTSOs are invoiced by Interpodia for offline registration fees owing. Validated amounts from a payment group will show under cheque in the Financials & Accounting tab (main menu).

FEE STRUCTURE

The following fee structure applies to all organizations using IceReg for the 2023/24, 2024/25, 2025/26, and 2026/27 seasons:

ONLINE REGISTRATION FEE For credit card payments made with Visa, Mastercard, Amex, Discover, Visa Debit, and Mastercard Debit. Fees apply to: memberships, registrations, and events.	Credit Card Processing Fee (Chase WePay & Stripe): 2.90% +\$0.30 +tx, per transaction Interpodia System Fee: 2.00% +tx, per transaction Total: 4.90% + \$0.30 +tx, per transaction
OFFLINE REGISTRATION FEE For payments made by cash, cheque, or EFT, and tracked using a payment group . Fees apply to: memberships only.	2.00% +tx, per registration
ONLINE STORE	4.90% + \$0.30 +tx, per transaction

NEED HELP?

SSC Resource Library

The <u>IceReg folder</u> of the SSC resource library is the primary source of IceReg information for PTSOs / clubs.

Interpodia Knowledge Base

Clubs can also consult Interpodia's bilingual <u>Knowledge Base</u> for how-to guides, articles, and helpful hints.

Technical Support

For technical support, please send an email to <u>info@icereg.ca</u>. **Allow 1-2 business days for a response**.

There is also a **chat box** available within the dashboard. The chat box is located at the bottomright of the dashboard and is visible from Monday to Friday between 7:00 AM and 5:00 PM PDT. **Response time ranges from a few minutes to a few hours**.

Questions in English and in French are welcome!

Can we talk?

If you need to have a **15-minute conversation** with the IceReg support team regarding portal configuration, technical issues, etc., please request a video phone call by sending an email to <u>info@icereg.ca</u> with your availability.

Note training fees apply to PTSOs / clubs wishing to schedule an individualized IceReg training session.

IceReg Information Sessions

At the beginning of each season, SSC shall coordinate four (4) IceReg information sessions – two (2) in English and two (2) in French – and any club is welcome to attend.

PTSOs and clubs wanting additional individualized IceReg training must contact <u>info@icereg.ca</u> to schedule a date and time. Note training fees shall apply.