

# WEST VIRGINIA BOARD OF ACCOUNTANCY BIG PICTURE CASE STUDY

## TRANSFORMING LICENSING OPERATIONS WITH BIG PICTURE SOFTWARE

### BEFORE BIG PICTURE SOFTWARE

The West Virginia Board of Accountancy (WVBOA) faced significant challenges in managing its licensure processes for Certified Public Accountants (CPAs) and public accountancy firms. With over 3,700 active licensees and several thousand inactive licensees under its jurisdiction, the Board's legacy systems and manual processes were struggling to keep pace with its needs.

Key pain points included:

- **Manual License Renewals:** Licensees submitted paper-based renewals, leading to delays, errors, and inefficiencies. Staff had to manually process applications, verify information, and input data into spreadsheets.



- **CPE Audits:** Conducting annual audits for approximately 10% of licensees required substantial staff time, as the process involved manually selecting licensees, sending notifications, and reviewing supporting documentation.
- **License Verification:** Members of the public and employers seeking to verify the status of a licensee had to contact the Board directly, which placed additional demands on staff.
- **Data Reporting:** Generating reports on licensing trends and compliance was cumbersome, requiring manual compilation of data across disparate systems.

## WHY BIG PICTURE SOFTWARE?

WVBOA sought a comprehensive solution to modernize its operations and improve efficiency. Key objectives included:

- **Streamlining License Renewals:** Transitioning to an automated online system to reduce administrative burden and improve accuracy.



- **Enhancing Compliance Monitoring:** Automating CPE audits to ensure regulatory compliance without overextending staff resources.
- **Improving Public Access:** Providing real-time license verification tools for the public and employers.
- **Optimizing Reporting:** Delivering intuitive reporting tools to track compliance, licensee activity, and operational metrics.

Big Picture Software's SaaS-based platform was selected for its proven track record of delivering customizable licensing solutions tailored to the needs of regulatory boards.



# IMPLEMENTATION AND KEY FEATURES

Big Picture Software worked closely with WVBOA to ensure a smooth implementation, dividing the project into key phases over a 6-month timeline:

## PHASE 1: NEEDS ASSESSMENT AND DATA MIGRATION

- Conducted a detailed analysis of the Board's workflows, pain points, and regulatory requirements.
- Securely migrated historical data, including licensee records, renewal history, and CPE compliance data, ensuring no loss of critical information.

## PHASE 2: COMPLIANCE AUTOMATION

- Implemented an intuitive online portal for licensees to submit applications and renewals.
- Automated reminders and error-checking tools reduced the need for staff intervention and improved compliance rates.

## PHASE 3: COMPLIANCE AUTOMATION

- Developed a system to automatically select 10% of licensees for annual CPE audits, ensuring compliance with minimal manual effort.
- Enabled licensees to upload CPE documentation directly, with automated notifications for any deficiencies.

## PHASE 4: PUBLIC LICENSE VERIFICATION

- Integrated a real-time verification tool on the Board's website, allowing stakeholders to instantly confirm the status of licensees.

## PHASE 5: REPORTING AND ANALYTICS

- Delivered advanced reporting tools, enabling the Board to generate detailed reports on licensing trends, compliance statistics, and audit outcomes with just a few clicks.

# RESULTS AND BENEFITS

Since partnering with Big Picture Software, the WVBOA has experienced transformative results:

## INCREASED EFFICIENCY

Automation of applications, renewals, and audits has significantly reduced processing times. Tasks that previously required days of manual effort are now completed within hours.

## IMPROVED ACCURACY

The elimination of manual data entry has minimized errors, ensuring the integrity of licensee records and compliance tracking.

## ENHANCED PUBLIC ACCESS

The real-time license verification tool has reduced call volumes and improved transparency, empowering the public and employers with immediate access to accurate information.

## DATA-DRIVEN DECISION MAKING

Customizable reporting tools have provided the Board with actionable insights, enabling them to identify trends and proactively address potential issues.

## CONCLUSION

The West Virginia Board of Accountancy's collaboration with Big Picture Software has successfully modernized its operations, setting a benchmark for regulatory boards seeking to enhance efficiency and service delivery. By automating key processes and providing intuitive tools for licensees and staff, Big Picture Software has helped the WVBOA achieve its goals of improving compliance, reducing administrative burden, and delivering exceptional public service. For more information on how Big Picture Software can transform your board, visit [www.ebigpicture.com](http://www.ebigpicture.com) or contact us at [info@ebigpicture.com](mailto:info@ebigpicture.com).



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