

Chartered Professional Accountants of Alberta Professional Development Terms & Conditions

Table of Contents

1.	Purchasing courses, programs, conferences, and products from CPA Alberta	3
a.	PD Savings Program	3
b.	Professional Development Formats and Participant Expectations.....	3
c.	Registration Process.....	3
d.	Copyright Protection.....	4
e.	The meaning of “Business Day”	4
2.	PD Savings Program Details	4
a.	Exclusive CPA Pricing.....	4
b.	Early Bird Registration Discount	4
c.	Bundle and Save Discount.....	5
d.	New Course Discount.....	5
3.	Passport Details and Transfer to New PD Portal	6
4.	Registration and Attendance	7
a.	Registration Processing and Confirmations	7
b.	Attendance and PD Credit.....	7
c.	Other	7
5.	Professional Development Enrollment Fees and Timelines.....	7
6.	Waitlist Policies & Procedures	8
a.	Course or Product Waitlist.....	8
b.	When a Spot Becomes Available	8
c.	When a Spot Does Not Become Available	8
7.	Dates, Times and Leader Changes.....	8
8.	Course Withdrawal, Transfer or Substitution	8
a.	Withdrawal or Transfer of Registration by Participants Live Virtual Courses, In-person Courses or Conferences	8
b.	Withdrawal or Transfer of Registration by Participants for On-Demand E-learning, Self-Study and web-based Products	9
c.	Withdrawal or Transfer of Registration by Participants for Virtual and In Person Executive Programs	9
9.	Participant Substitutions	9
a.	Participant Substitutions.....	9

b.	Participant Substitutions with Pre-work.....	9
c.	On-demand e-learning, Self-Study, and Web-based Products	9
d.	Participant Substitutions for Executive Programs	9
10.	Participant No-Shows	10
a.	In-Person Courses	10
b.	Live Web-based Courses	10
11.	Late Course Withdrawal, Transfers, Substitutions and No-Shows	10
12.	Course Changes or Cancellations by CPA Alberta (CPAA)	10
a.	Change of Date.....	10
b.	Change of Venue	10
c.	Cancellation of Course	10
13.	Course Materials and Pre-Work Requirements	10
a.	In-Person Courses, Live Virtual Courses and Webinars	10
b.	On-demand and Recorded Webinars	10
c.	Pre-work.....	11
14.	Web-based Course Login Access.....	11
a.	Login Access Timelines.....	11
b.	Access Restrictions.....	11
15.	CPA Canada Professional Development	11
16.	Confirmation of Registration for CPD Reporting.....	11
17.	Receipts	11
18.	GST Exemptions	11
19.	Privacy Statement	12
20.	Terms and Conditions Updates and Changes	12
21.	Respectful Workplace Policy.....	12

The Terms & Conditions apply to all Chartered Professional Accountants of Alberta Professional Development purchases. By purchasing products from CPA Alberta (CPAA) you, the participant, automatically agree to the CPAA Professional Development (PD) Terms & Conditions.

Within this document, any reference to “registration” or “course” refers to all CPAA PD, courses, conferences, specialized PD days, executive programs, web-based courses, passports, or any other products and services offered with the CPAA PD programs unless otherwise specified.

1. Purchasing courses, programs, conferences, and products from CPA Alberta

You must have a current email address indicated as “preferred” in your CPAA profile. You are responsible to ensure that all contact information in your CPAA profile is up to date. CPAA will not be responsible for any undelivered emails, phone calls and/or confirmations due to an outdated profile. Please the log in to the [Member Portal](#) to update your e-mail address.

For web-based courses, it is your responsibility to refer to the CPAA website [here](#) for all information regarding technical requirements needed for the course. It is your responsibility to ensure that all minimum computer technical requirements are met. No refunds, transfers or substitutions will be provided for participants who do not verify the technical requirements before enrolling or who do not meet the technical requirements for any online course.

a. PD Savings Program

The PD Savings Program provides multiple discounts opportunities on applicable CPAA courses, products, on-demand e-learning, conferences, specialized PD days, or any web-based courses. See section 2 for more details.

b. Professional Development Formats and Participant Expectations

Web-based Products: An online virtual course, webinar (recorded or live).

- i. **Live Virtual Course:** This instructor leads training is an interactive course delivery on a specific topic that is more detailed than a cursory review.
- ii. **On-demand E-Learning:** A recording of a course that provides a self-paced, online learning experience.
- iii. **Other Courses and Products:** New course formats and products can be added to the PD program at any time. Participation and expectations will be identified without notice.

In-Person Courses: A live course where you, the participant, have attended and actively engaged in learning at a specific location, date and time. These can be half-day, full-day or two-day courses.

Conferences and Specialized PD Days: (online or in-person) One (1) or more days where you, the participant, can select from multiple concurrent sessions that are available and you, the participant, have attended and actively engaged in learning at a specific location, date and time.

Executive Programs: A multi-day program (online or in-person) that may require pre-work and involves in-depth work and participation at a specific location, date and time.

c. Registration Process

Registrations are accepted online only.

Any changes to registrations that require execution by CPAA can be submitted in writing to pdregistration@cpaalberta.ca or by calling 1-800-232-9406.

For your safety please do not send any credit card information in any form of email correspondence to CPAA.

d. **Copyright Protection**

All material is delivered to you by CPAA and uses copyrighted works under license. All rights reserved.

e. **The meaning of “Business Day”**

All CPAA’s deadlines are based on the number of workdays (Monday-Friday)—not including weekends or statutory holidays—before the date of the course. The day of the course or product is not considered a business day.

2. **PD Savings Program Details**

With the introduction of the new and improved professional development (PD) portal in August 2022, the PD Passport Program will be replaced with a new and flexible PD Savings Programs.

a. **Exclusive CPA Pricing**

Savings:

Alberta CPAs will receive a lower early bird and regular price than the general public. The savings vary depending on the course and product purchased.

Who Qualifies:

Available to Alberta CPAs and CPA PEP candidates.

Requirements:

You must register for applicable courses using your CPA Alberta Member profile to qualify for this savings discount.

Inclusions:

Virtual live courses, in-person courses, select live certificate programs, and on-demand elearning courses.

Exclusions:

Executive programs, virtual or in-person conferences and some certificate programs.

b. **Early Bird Registration Discount**

Savings:

Register at least 25 days before the start date of a live virtual or in-person course and receive a 10% discount.

Requirements:

Purchase must be completed a minimum of 25 days prior to the course start date for the discount to be applied.

Who Qualifies:

Available to all purchasers.

Inclusions:

Virtual live courses, in-person courses, and select live certificate programs.

Exclusions:

Executive programs, select certificate programs, virtual or in-person conferences, and on-demand elearning courses.

c. Bundle and Save Discount**Savings:**

Register for multiple live virtual and in-person courses, on-demand e-learning courses and conferences by one individual to increase your savings.

The minimum purchase amounts in a single transaction to achieve the percentage savings is as follows:

Savings	5%	10%	15%	20%
Minimum Purchase Amount	\$750 to \$1249.99	\$1,250 to \$1,749.99	\$1,750 to \$2,249.99	\$2,250 or more

Requirements:

Purchase must be in a single transaction.

All purchases must be for a single individual. Transfers and substitutions are not permitted.

Minimum purchase amount is before all applicable taxes.

When a withdrawal with a refund, transfer or substitution is processed and the minimum purchase amount is not maintained then the discount percentage savings will be adjusted to the lower discount percentage or no savings percentage depending on the total purchase amount.

Who Qualifies:

Available to all purchasers.

Inclusions:

Virtual live courses, in-person courses, select live certificate programs, on-demand elearning courses and virtual and in-person conferences.

Exclusions:

Executive programs and select certificate programs.

d. New On-Demand E-learning Course Discount**Savings:**

Receive a 20% discount on new on-demand e-learning courses in the first 30 days it is available for sale.

Requirements:

A new on-demand e-learning course is an on-demand e-learning course that has not been available for sale from CPA Alberta in the past five years.

Who Qualifies:

Available to all purchasers when a new on-demand e-learning course is released by CPA Alberta.

Inclusions:

On-demand elearning courses.

Exclusions:

Virtual live courses, in-person courses, live certificate programs, virtual or in-person conferences and executive programs.

3. Passport Details and Transfer to New PD Portal

With the introduction of the new and improved professional development (PD) portal in August 2022, the PD Passport Program has been replaced with a new and flexible PD Savings Programs.

See section 2 for details.

As of August 4, 2022, CPA Alberta transitioned to a new registration system. Any remaining tickets on your PD Passport have been transferred to the new system as credit.

To facilitate this transfer, the purchase amount of your remaining tickets have been converted to credits in the new system. The credits can then be applied toward professional development courses and products. The same expiry date which applied to your original tickets will apply to these credits. The credits must be used by August 31, 2022 for courses occurring on or before December 31, 2022

Mini Personal Pass and Personal Pass credits can only be used by the passport holder. Share Pass credits can be transferred to others to use to register for applicable courses.

Credits will be available for you to apply to your purchase upon checkout. If you had multiple passports, multiple credits can be applied in a single transaction.

Until August 4, 2022, the following is applicable:

All 2021-2022 and the new 2022 Transitional PD Passports expire on August 31, 2022. Any unused tickets in the Passport cannot be refunded, credited or carried forward. All Passports are not refundable and are available on a first-come, first-served basis.

Tickets can only be used on PD passport eligible products offered within the time frame of April 14th, 2022 to August 31st, 2022.

Courses that cannot be registered for by using tickets are clearly indicated in the PD Portal and on the website by showing no ticket values. Passport tickets cannot be used towards any administration fees, cancellation fees or retroactive purchases for any reason.

If you would like to attend a course and require additional tickets, the purchase of up to 6 additional tickets per Passport is permitted.

Passport tickets cannot be combined with other passport types if different (ex: Personal Pass with Mini Personal Pass).

4. Registration and Attendance

All fees must be paid in full before attending. Registrations on the day of an in-person course are not permitted. Registrations for online courses may be permitted on a case-by-case basis the day of the course – please call the Professional Development department at 1-800-232-9406 to inquire.

a. Registration Processing and Confirmations

Registrations are processed on a first-come, first-served basis and courses can fill up quickly. By registering online through your CPAA PD profile, all registrations are processed immediately.

Upon completion of registration online, a receipt and then a course confirmation email will be sent to the email address in your CPAA profile. You will also be able to see your registration immediately in the learning management system.

b. Attendance and PD Credit

To receive PD credit for Live Virtual Courses, you must join the course through the Learning Management System to be marked as present.

To receive PD credit for in-person courses, your name must be on the registration list and you must be present when attendance is recorded by the instructor, otherwise, there is no way of verifying whether you have attended a course or received the product. If your name is not on the registration list, you will not be permitted entry into the course.

Upon completion of a live virtual course or on demand product, a certificate completion be available to download through the Learning Management System. You will be able to view and print your current and previous registrations in your CPAA PD profile for your records. For information on what is required for tracking your CPD please refer to “What is considered a CPD Learning Activity” for further details.

c. Other

For in-person learning, parking fees are the responsibility of the participant. CPAA will not pay for any expenses accrued during a course.

5. Professional Development Enrollment Fees and Timelines

All fees must accompany registrations and be paid in full at the time of registration.

Registrations will not be processed without payment.

Credit cards (American Express, MasterCard and Visa) are accepted methods of payment for registration fees.

All fees are subject to GST.

Registrations for **in-person courses** must be received more than three (3) full business days prior to the course start date, unless otherwise indicated on the registration page.

Registrations for **live virtual courses** must be received up to one (1) full business day prior to the

course start date, unless otherwise indicated on the registration page.

Registrations for **on-demand e-learning courses** are available anytime until the registration deadline provided to give the user adequate time to complete the course. Select on-demand courses have a time period to complete the course (varies from 3 months to 1 year) and other on-demand courses have a specific deadline to complete the course which will be clearly indicated in the course special instructions.

Registrations for **virtual conferences** must be received more than three (3) full business days prior to the course start date, unless otherwise indicated on the registration page.

Registrations for **in-person conferences** must be received more than ten (10) full business days prior to the conference start date.

Registrations for **in-person and virtual executive programs** must be received more than twenty (20) full business days prior to the conference's start date.

The day of the course, conference or executive program is not considered a business day. Some restrictions may apply for web-based courses or courses that require pre-work.

6. Waitlist Policies & Procedures

a. Course or Product Waitlist

Due to a high volume of registrations, there may be an option to be “waitlisted” if a course has become full. There is no cost or additional fee to be placed on the waitlist. Being placed on the waitlist does not guarantee a spot in the course.

b. When a Spot Becomes Available

If waitlisted and a spot becomes available, you will be sent a notification email from CPAA informing you that you can register for the course. You will have 24 hours to register and pay before the spot is released. Until you receive confirmation of registration and have paid for the course refunds, transfers and participant substitutions are not permitted on the waitlist.

Course location or online access details will be emailed to you once payment for the course has been received.

c. When a Spot Does Not Become Available

If a spot does not become available, you will be notified by email.

7. Dates, Times and Leader Changes

All CPAA courses are subject to change between the time of publication and the date of the course. An e-mail notification indicating any changes will be sent to registered participants.

It is your responsibility to check the CPAA PD Portal for course details and changes.

8. Course Withdrawal, Transfer or Substitution

a. Withdrawal or Transfer of Registration by Participants Live Virtual Courses, In-person Courses or Conferences

Full refunds will be granted more than ten (10) full business days before the start date of a course, webinar or conference. Some restrictions may apply with courses that have pre-work or web-based courses with access credentials sent in advance, in which an admin and/or material fee(s) may be applied.

Withdrawal or transfer of registrations received less than ten (10) full business days, and more than three (3) full business days before the course start date require an admin and/or material fee(s).

Full refunds will not be granted if the written withdrawal/transfer request is received three (3) business days or less before the course start date. Some exceptions may apply and will be reviewed on a case-by-case basis.

b. Withdrawal or Transfer of Registration by Participants for On-Demand E-learning, Self-Study and web-based Products

Once the on-demand e-learning, self-study, or web-based product materials have been released and/or sent to the registered participant, withdrawals and transfers are not permitted. Some exceptions may apply.

c. Withdrawal or Transfer of Registration by Participants for Virtual and In Person Executive Programs

Full refunds less an administration fee will be granted more than thirty (30) full business days before the start date of an executive program.

Withdrawal or transfer of registrations for executive programs received less than thirty (30) full business days, and more than twenty (20) full business days before the course start date are subject to an administration and/or material fee(s)

Refunds will not be granted if the written withdrawal/transfer request is received twenty (20) business days or less before the executive program course start date

9. Participant Substitutions

Participant substitution occurs when one person takes the place of another person in the same course.

a. Participant Substitutions

Participant substitutions will only be accepted up to one (1) business day prior to the course date. No substitutions will be accepted on the day of the course.

b. Participant Substitutions with Pre-work

Courses with pre-work can be processed no later than five (5) business days prior the course date to allow time for completion. Requests for substitutions less than five (5) business days and more than one (1) business day will be subject to admin and/or material fee(s).

c. On-demand e-learning, Self-Study, and Web-based Products

Once the on-demand e-learning self-study or web-based product materials have been released and/or sent to the registered participant, no substitutions are permitted. Some exceptions may apply.

d. Participant Substitutions for Executive Programs

Participant substitutions will only be accepted up to twenty (20) business days prior to the executive program start date. No substitutions will be accepted within twenty (20) business days of the first date if the Executive Program. Additional fees may apply.

10. Participant No-Shows

a. In-Person Courses

Attendance will be taken during the course by the instructor. If you do not attend, you will be listed as absent.

b. Live Web-based Courses

Attendance will be recorded and tracked through the Learning Management System. Live Web-based courses will not be recorded for future viewing unless indicated.

11. Late Course Withdrawal, Transfers, Substitutions and No-Shows

Written email requests for a refund or transfer after the course has passed will be reviewed on a case-by-case basis.

12. Course Changes or Cancellations by CPA Alberta (CPAA)

Every effort will be made to provide ample time for communication when a course is cancelled, however, in rare instances, CPAA is forced to cancel a course on short notice due to unforeseen circumstances. Please ensure your CPAA profile is up to date with a current mobile phone number as this is the best method for contacting individuals on short notice. CPAA is not liable for any financial losses as a result of the cancellation or incorrect contact information. CPAA's liability is limited to the course fees paid.

a. Change of Date

In the event that a course has been moved to a different date, CPAA will provide a full refund or will transfer you to the next offering of the course.

b. Change of Venue

In the event that a venue has been changed, CPAA will notify you by email of these changes.

c. Cancellation of Course

CPAA reserves the right to cancel any course for any reason. Notice of cancellation will be given a minimum of five (5) business days in advance of the course start date when possible. A full refund in the same payment method used to purchase the course will be provided, or a transfer to an available course if applicable.

13. Course Materials and Pre-Work Requirements

a. In-Person Courses, Live Virtual Courses and Webinars

You will receive an email one (1) business day prior to the course date directing you to access your online materials through the [Learning Management System](#). You will have access to the material for up to 30 days after the course has ended.

b. On-demand and Recorded Webinars

Materials can be accessed by logging into the [Learning Management System](#) selecting the course title on the dashboard. The materials will be available to download under the course menu. For certain Web-based courses, materials will be accessed based on availability by the provider. In such

instances, an email will be sent directing you as to when your materials will be available and how to access them.

c. Pre-work

Courses requiring pre-work will need to be completed in the timeline specified.

14. Web-based Course Login Access

a. Login Access Timelines

Login information and instructions will be sent to you by email. If you do not receive an email within the timelines provided for each course, please contact the CPAA Professional Development team by email at pdregistration@cpaalberta.ca for the status of your login credentials.

- i. **Live Virtual Courses:** Access information will be emailed one (1) day before the start time of the virtual course, and one (1) hour before the start time of the virtual course.
- ii. **Online E-learning:** Access information is provided in the itinerary field of the purchase confirmation e-mail.
- iii. **Other Online or Web-based Professional Development Courses:** As new online courses, webinars (recorded or live), or any other virtual courses are added, new access methods will be added without notice.

b. Access Restrictions

Registration in a web-based course is intended only for the person who has registered for the course. Sharing login credentials, content, files, material, resources, services and shared viewing are not permitted.

15. CPA Canada Professional Development

CPAA courses, conferences, programs, and products are not related to CPA Canada courses, conferences, programs, and products.

All **CPA Canada** products, courses, programs, and conferences are ineligible for all discounts within the PD Savings Program as listed in section 2.

16. Confirmation of Registration for CPD Reporting

Upon completion of a live virtual course or on demand product, a certificate completion be available to download through the Learning Management System. You will be able to view and print your current and previous registrations in your CPAA PD profile for your records. For information on what is required for tracking your CPD please refer to "[What is considered a CPD Learning Activity](#)" for further details.

17. Receipts

Course details can be re-printed by logging into your [CPAA PD profile](#) and selecting the History section from the main menu. Payment Receipts are attached in the purchase confirmation e-mail for each PD course registration. Please e-mail pdregistration@cpaalberta.ca to request copies of your registrations receipts resent.

18. GST Exemptions

Please note that all courses are subject to GST. While CPAA understands that some organizations are GST exempt, courses are attended by the individual, not the organization, and are thus subject to GST regardless of employer or employment status. This is the position taken by the Canada Revenue Agency.

19. Privacy Statement

Your privacy is very important to CPAA. Please refer to the [privacy statement](#) on the CPAA website.

20. Terms and Conditions Updates and Changes

CPAA reserves the right to change and update all Terms & Conditions without notice.

21. Respectful Workplace Policy

In addition to the [Chartered Professional Accountants Act](#) and the [CPA Alberta Rules of Professional Conduct with Guidance](#), the Association also adheres to a Respectful Workplace Policy, and does not condone or tolerate any conduct, comment, gesture or contact that may be considered discriminatory or constitute as harassment. Participants are expected to behave professionally at all times. Participants will refrain from:

- making any comments, written or verbal, that are demeaning, offensive or insulting
- using profanity or other offensive words
- yelling or shouting
- acting in an intimidating or threatening manner

CPAA staff reserve the right to end their interaction with participants who behave inconsistently with these expectations. If the behavior is extreme or repeated, a staff member may, at their discretion, file a formal complaint with the CPAA Compliance Manager, which may lead to disciplinary action.

These policies apply to all CPAA staff, non-members, CPA members and lecturers.

(Link: <http://www.cpaalberta.ca/Protecting-the-Public/Governing-Documents>)