

Chartered Professional Accountants of Alberta Professional Development Terms & Conditions

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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 CPAA will not be responsible for any undelivered emails, phone calls and/or confirmations due to an outdated profile.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).

Live Virtual Course: This instructor leads training is an interactive course delivery on a specific topic that is more detailed than a cursory review.

On-demand E-Learning: A recording of a course that provides a self-paced, online learning experience.

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**

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. 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. Views Expressed Disclaimer

The views and opinions expressed by an instructors, presenter or other contractor are the views of that person and may not represent the views or opinions of CPA Alberta or its employees.

d. Other

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

4. 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 e-learning courses are available anytime until the registration deadline provided to give the user adequate time to complete the course. Select e-learning courses have a time period to complete the course (varies from 3 months to 1 year)

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.

5. 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. Registration is on a first come first served basis. 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.

6. 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.

7. Course Withdrawals, Transfer, Substitutions and No Shows

a. Withdrawal or Transfer of Registration by Participants

i. Live Virtual Courses, In-person Courses or Conferences

Full refund to a store credit will be granted more than ten (10) full business days before the start date of a course, webinar or conference. A refund to the original payment method such as a credit card or cheque will be provided upon request only. 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.

ii. **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.

iii. **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.

b. **Participant Substitution**

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

i. **Live virtual and in-person courses without pre-work.**

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.

ii. **Live virtual and in-person courses 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).

iii. **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.

iv. **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.

c. **Participant No-Shows**

i. **In-Person Courses**

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

ii. **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.

d. **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.

8. 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.

9. 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.

10. 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 pregistration@cpaalberta.ca for the status of your login credentials.

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.

Online E-learning: Access information is provided in the itinerary field of the purchase confirmation e-mail.

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 length e-learning, on-demand, and web-based courses

E-learning, on-demand, and web-based courses have a specific time where the course is available to the customer. The access time for a course varies from 30 days to one year. This is clearly indicated in the course special instructions, the enrollment e-mail, or by logging into <http://learn.cpaalberta.ca>.

c. Course Access Timeline Extension Requests

E-learning, on-demand, and web-based courses have a specific deadline to complete the course which will be clearly indicated in the course special instructions, the enrollment e-mail, or by logging into <http://learn.cpaalberta.ca>. A onetime extension of up to 30 days will be granted for e-learning courses upon written request to pregistration@cpaalberta.ca or by calling 1-800-232-9406.

d. 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.

11. 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.

12. 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.

13. 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.

14. 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.

15. Privacy Statement

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

16. Terms and Conditions Updates and Changes

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

17. 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>)