

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 “seminar” refers to all CPAA PD, seminars, conferences, specialized PD days, executive programs, web-based seminars, passports, or any other products and services offered with the CPAA PD programs unless otherwise specified.

1. Before Purchasing a Seminar, Conference, Specialized PD Day, Executive Program, Web-based Seminar, Passport or Other Product

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 CPAA will not be responsible for any undelivered emails, phone calls and/or confirmations due to an outdated profile.

For web-based seminars, it is your responsibility to refer to the CPAA website [here](#) for all information regarding technical requirements needed for the seminar. 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 seminar.

a. Passports

The Share Pass, Personal Pass and Mini Personal Pass¹ provide discounts on passport-valid CPAA seminars, products, conferences, specialized PD days, or any web-based seminars and are valid from April 1, 2019 to August 31, 2020. Up to six additional tickets can be purchased per Pass, per year.

b. Registration Formats and Participation Expectations

In-Person Seminars: A live seminar 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 seminars.

Conferences and Specialized PD Days: One 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 that may require pre-work and involves in-depth work and participation at a specific location, date and time.

Self-Study: A copy of the in-person seminar material that you can read and claim non-verifiable CPD hours for. Self-Study materials do not have quizzes.

Web-based Products: An online seminar, webinar (recorded or live), live broadcast seminar or any other virtual seminar.

- i. **Digital Media/Recorded Webinars/Audiowebs:** A pre-recorded seminar/webinar that may include seminar materials, and may contain quizzes that must be completed before the expiry date in order to receive verifiable credit.
- ii. **Online Self-Studies:** Seminar material is available online for you, the participant, to review with a facilitator who is available to answer questions with a pre-set expiration date. Online Self-Studies have quizzes that must be completed before the expiry date in order to receive verifiable credit for the seminar. Online-Self-Studies have an expiry date and extensions are not permitted.
- iii. **Live Broadcasts/Live Webinars:** A live seminar where you, the participant, must be logged in during the live broadcast/live webinar and participate when prompted. Lack of participation during the seminar will result in no credit earned for the seminar as attendance will be monitored and recorded. Recordings of a live broadcast/live webinar will not be available after it has concluded.

¹ The Personal Pass and Mini Personal Pass can only be purchased by Alberta CPAs and candidates.

- iv. **Mobile Learning:** An audio-only course which you, the participant, can listen to on any mobile device. There is a skill-testing component to verify learning.

Other Seminars and Products: New seminar formats and products can be added to the PD program at any time. Participation and expectations will be identified and added without notice.

c. Registration Process

Registrations are accepted online only.

Any changes to registrations that require execution by CPAA staff must be submitted in writing to pdregistration@cpaalberta.ca . CPAA staff will not be able to make changes over the phone or in-person for your protection.

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. What is Meant by “Business Day”

All of CPAA’s deadlines are based on the number of work days—not including weekends—before the date of the seminar. The day of the seminar or product is not considered a business day.

2. Passport Details

All Passports expire on August 31, 2020. 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 be used to attend select CPAA seminars and are valid from April 1, 2019 to August 31, 2020.

Seminars that cannot be registered in using tickets are clearly indicated in the catalogue and on the website as *Passport Invalid*. Passport tickets cannot be used towards any administration fees, cancellation fees or retroactive purchases for any reason.

If you would like to attend a seminar 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).

a. **Personal Pass**

i. **Who Can Purchase**

You qualify to purchase a Personal Pass if you are a CPAA designated member or candidate. This Passport is non-transferable (only the Passport holder can use it).

ii. **Tickets**

The Personal Pass comes with 42 tickets.

b. **Mini Personal Pass**

i. **Who Can Purchase**

You qualify to purchase a Personal Pass if you are a CPAA designated member or candidate. This Passport is non-transferable (only the Passport holder can use it).

ii. **Tickets**

The Mini Personal Pass comes with 21 tickets.

c. **Share Pass**

i. **Who Can Purchase**

Anyone can purchase a Share Pass. It is transferable between friends, colleagues, and anyone in your network, making it CPAA's most flexible Pass. The principle owner does provide consent to share the passport once purchased.

ii. **Tickets**

The Share Pass comes with 42 tickets.

CPAA In-Person Seminars, Conferences, Specialized PD Days, Executive Programs, Web-Based Seminars and Other Products

3. Registrations

All fees must be paid in full before attending. Walk-ins on the day of the seminar are not permitted.

In order for you to receive PD credit, your name must be on the registration form and sign-in sheet, otherwise, there is no way of verifying whether you have attended a seminar or received the product. If your name is not on the registration list you will not be permitted entry into the seminar.

Where applicable, parking fees are paid by you, the participant. CPAA will not pay for any fees accrued during a seminar.

a. Registration Processing and Confirmations

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

Upon completion of registration online, you, the participant, will receive a confirmation email to the address noted in your CPAA profile with your receipt attached. You will also be able to see your registration immediately in the “Current Schedule” area of your CPAA PD profile.

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.

Passport tickets and credit card (American Express, MasterCard and Visa) are accepted methods of payment for registration fees.

All fees are subject to GST.

Registrations must be received more than three (3) full business days prior to the seminar start date. The day of the seminar is not considered a business day. Some restrictions may apply for web-based seminars or seminars that require pre-work.

5. Waitlist Policies & Procedures

a. Seminar or Product Waitlist

Due to a high volume of registrations there may be an option to be “waitlisted” if a seminar 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 seminar.

b. When a Spot Becomes Available

If waitlisted and a spot becomes available, you will be sent a notification email from CPAA’s automated system informing you that you can register for the seminar. You will have 24 hours to register and pay before the spot is released. Refunds, transfers and participant substitutions are not permitted if you have not received a waitlist registration email.

Seminar location and details will be emailed to you once payment for the seminar has been received.

If applicable, access information will be emailed to you once you are registered into a seminar.

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 seminars are subject to change between the time of publication and the date of the seminar.

It is your responsibility to check your “Current Schedule” in the CPAA PD Portal for seminar details and changes.

7. Seminar Withdrawal or Transferring to Another Seminar

a. Withdrawal or Transfer of Registration by Participants

Full refunds will be granted more than ten (10) full business days before the start date of a seminar. Some restrictions may apply with seminars that have pre-work or web-based seminars 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 seminar 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 seminar start date. Some exceptions may apply and will be reviewed on a case-by-case basis.

8. Participant Substitutions

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

a. Participant Substitutions

Participant substitutions will only be accepted up to one (1) business day prior to the seminar date. No substitutions will be accepted on the day of the seminar. Participants are eligible for substitutions if registration had been made using Share Pass tickets or credit card (Personal Pass and Mini Personal Pass tickets are non-transferable).

b. Participant Substitutions with Pre-work

Seminars with pre-work can be processed no later than five (5) business days prior the seminar date. 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. Self-Study and Web-based Products

Once the 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.

9. Participant No-Shows

a. In-Person Seminars

Your initials are required by your name on the sign-in sheet with the instructor on the day of the seminar or you will be listed as “No-Show” and will not earn credit for the PD seminar.

b. [Web-based Seminars](#)

Reports of attendance and participation are sent to CPAA from the vendor for their records. If you do not participate or complete the required work, you will be considered a No-Show and will not earn credit for the PD seminar.

10. [Late Seminar Withdrawal, Transfers, Substitutions and No-Shows](#)

Written email requests for a refund after the seminar has passed will be reviewed on a case-by-case basis. Reasons of bad weather, work, and family commitments will not be considered.

11. [Seminar Changes or Cancellations by CPAA](#)

Every effort will be made to provide ample time for communication when a seminar is cancelled, however, in rare instances, CPAA is forced to cancel a seminar on short notice due to circumstances outside of their control. 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 seminar fees paid.

a. [Change of Date](#)

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

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 Seminar](#)

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

12. [Seminar Materials and Pre-Work Requirements](#)

a. [In-Person Seminars](#)

You will receive an email three (3) business days prior to the seminar date directing you to access your online materials through your CPAA PD Profile. You will have access to the material for up to 30 days after the seminar has ended.

You may download or print the seminar materials for your use. Alternatively, CPAA recommends you bring your computer or tablet to the seminar to view your materials electronically so you can follow along during the seminar.

b. [Web-based Seminars](#)

Web-based seminar materials will be accessed based on availability by the provider. An email will be sent directing you as to when your materials will be available and how to access them.

c. Pre-Work

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

13. Web-based Seminar 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 seminar, please contact the CPAA Professional Development team by email at pdregistration@cpaalberta.ca for the status of your login credentials. Extensions and refunds will not be granted for missing login information.

- i. **Digital Media/Recorded Webinars/Audiowebs/Mobile Learning:** Login credentials will be emailed 2-5 business days from the date of registration.
- ii. **Online Self-Studies:** Login credentials will be emailed two (2) business days prior to the first day the Online Self-Study will be available. If you register after the first day, login credentials will be emailed 2-5 business days from the date of registration.
- iii. **Live Broadcasts/Live Webinars:** Login credentials will be emailed 2-5 business days before a live broadcast/live webinar starts. If you have registered in a live broadcast/live webinar and have not received your access information within two (2) business days of the live broadcast/live webinar date, please contact the CPAA Professional Development team.
Note: Some live broadcasts/live webinars may require you to login ahead of time to ensure you have the appropriate software requirements needed to participate in the seminar. It is your responsibility to ensure you do all pre-checks before the day of the seminar.
- iv. **Other Online or Web-based Professional Development Seminars:** As new online seminars, webinars (recorded or live), live broadcasts or any other virtual seminars are added, new access methods will be added without notice.

b. Access Restrictions

Registration in a web-based seminar is intended only for the person who has registered for the seminar. Sharing login credentials and material is not permitted.

c. CPA Canada Professional Development

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

14. Confirmation of Registration for CPD Reporting

A certificate or letter to confirm attendance at a seminar or product will not be provided. You will be able to view and print your current and previous registrations in your CPAA PD profile for your records.

15. Receipts

Receipts can be re-printed through your CPAA PD profile under the History section.

Effective January 1, 2009, CPAA has been certified by Human Resources & Skills Development Canada as an educational institution, thus, tax receipts (valid for s.118.5 of the Income Tax Act) can be issued for seminar amounts over \$100 that "provide students with sufficient skills to enable them to work in, or to improve their skills in a recognized occupation". Certification does not guarantee that the Canada Revenue Agency will automatically accept, for tuition tax credit purposes, receipts for all seminars or programs.

16. GST Exemptions

Please note that all seminars are subject to GST. While CPAA understands that some organizations are GST exempt, seminars 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.

17. Privacy Statement

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

18. Terms and Conditions Updates and Changes

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

19. 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>)