



CA SCHOOL OF BUSINESS PRIVACY POLICY

SEPTEMBER 2004

The CA School of Business (CASB) began operations on April 1, 2000, and was incorporated on June 14, 2000 as a "Without Share Capital Corporation" under Part II of the Canada Corporations Act. The purpose of CASB is to provide pre-certification educational, training, developmental and related administration services in support of the CA profession. The Institutes of Chartered Accountants of Manitoba, Saskatchewan, Alberta, and British Columbia are Members of the Corporation. Candidates and training offices in the Institutes of Chartered Accountants of the Yukon, and the Northwest Territories and Nunavut are to be treated on the same basis as those in the member institutes. CASB is a not-for-profit organization under the Income Tax Act, and is not subject to either federal or provincial income taxes.

The mandate of the CA School of Business is: "To establish and operate an educational organization to provide education, training, developmental and related administrative services in support of the chartered accountancy profession."

CASB is committed to ensuring high standards of confidentiality with respect to the personal information collected from students and maintained by CASB. CASB co-operates with participating institutes with respect to the privacy policy of the provincial institute under which its students are governed.

CASB is responsible for the personal information under its control and will comply with the Personal Information Protection and Electronic Documents Act (PIPEDA), Personal Information Protection Act, (PIPA), Freedom of Information and Protection of Privacy Act (FOIPPA) and the privacy policies of the provincial institutes of Chartered Accountants under which a student is governed. CASB has designated a Privacy Director who will ensure compliance with privacy policies. CASB's privacy director is accountable for ensuring CASB's compliance with the principles outlined in its privacy policy. Inquiries regarding the access to student information should be directed to the privacy director at: privacy@casb.com

Purposes of Collection and Storage of Student Personal Information

CASB uses student information to distribute CASB program-related information or to advise students of any changes in policy. Student information is also collected for statistical purposes and to track regional employment trends.

CASB neither sells nor distributes student information to outside parties. Visitors to www.casb.com, CASB's public website, are not required to reveal any personal information.

CASB exchanges information with the following affiliated organizations:

- The Canadian Institute of Chartered Accountants (CICA)
- Institute of Chartered Accountants of British Columbia (ICABC)
- Institute of Chartered Accountants of Alberta (ICAA)
- Institute of Chartered Accountants of Saskatchewan (ICAS)
- Institute of Chartered Accountants of Manitoba (ICAM)
- Western CA Services Association (WCASA)

In the course of possible disciplinary action against a student as a result of an academic offence, a student's personal information is shared with committee members as part of the investigative procedure and, as indicated in the CASB Education Policy and Student Resource Guide, with the student's firm should the student's guilt be determined in commitment of an academic offence.

Registration Information

When an individual registers as a student in the CASB program, CASB collects and stores personal information in conjunction with the student's registration application. CASB endeavours to maintain the accuracy of student information by requesting that students update their information with CASB on a regular and timely basis.

CASB collects and stores post-secondary education history and transcripts to confirm the awarding of the necessary university degree required for admission to the CASB program and to confirm successful completion of required pre-requisites.

Students and/or employers may provide CASB with credit card information related to specific transactions associated with student registration in the CASB program including: dues, materials, special documentation requests, assessments, and module registration fees. This information is used only for the specific transaction and not for any other purpose. It is stored in the student file with registration information.

CASB does not collect student social insurance numbers.

Student Information—Medical or Health-related

Personal health information is collected with the individual's consent in conjunction with a student's request for accommodation in the face-to-face interactive session or evaluation session. This information is used only for establishing necessary evaluation or accommodation circumstances. This information is accessed by the Associate Registrar and Vice-President, Learning. Personal health information could be shared when and if reasonable and appropriate to the student's well-being with an invigilator or FFIS facilitator. The information could be shared with CICA in conjunction with the student's application to write the UFE.

Student Information

All CASB employees who work with, and have access to, students' personal information maintain the strict confidentiality of all information.

“Transitional” student record files forwarded from the Provincial Institutes of Chartered Accountants of British Columbia, Alberta, Saskatchewan and Manitoba are part of CASB’s files.

CASB student files are kept for as long as they are reasonably required for legal or business purposes. After three years inactive files are stored on microfiche. Hard copies of these files are shredded once they are stored on microfiche.

Student information, including module and UFE results, is shared with the Provincial Institutes of Chartered Accountants and employers. Module results and UFE results are provided to a student’s ATO. Students agree to this process upon signing the CASB student registration application. Successful UFE writers may be identified by name in public advertising and/or other promotional materials.

UFE results are shared with universities.

Student’s business information is shared with WCASA.

Opting Out

Any CASB student may request access to the personal information in their student file and/or to verify his/her personal information at any time by contacting: privacy@casb.com

This access is provided at no charge to the student.

Students have the option to withdraw consent for CASB to use or disclose information by advising CASB’s privacy officer in writing. This may affect a student’s continued registration in the CASB program.

Approved by the CASB Board of Directors: September 16, 2004