

# CPA ONTARIO PROFESSIONAL DEVELOPMENT FAQs

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## Registration Policies

### How can I register for PD seminars?

Registrations can only be made [online](#). Payment can be made by using VISA, MasterCard or INTERAC Online Service Banking.

### Who can register for PD seminars?

Both members and non-members may register themselves or others into our PD seminars. Members receive preferred rates on PD programs including access to the PD Passport program.

### When is the deadline to register for a PD seminar?

Registration deadline is 9:00am, two business days prior to the seminar date.

### Can I pay via cheque?

If paying by cheque, please include a list of all registrations, including seminar date and location, as well as attendee name and email address.

Please note that spots cannot be held prior to the cheque being received, registrations will be made in the order that payment is received.

### How will I know if I my registration has been processed?

Confirmations will be emailed to all registrants. A valid email address will be required for each registrant. Please ensure that your email address is up to date.

### Is there a waitlist for PD seminars?

We do not keep wait-lists for seminars that have sold out. A new session may be added to the schedule if the interest level warrants it.

### How will I receive the program materials?

Materials for PD seminars and conferences will be distributed electronically to attendees unless otherwise noted. Please ensure your email address on file with CPA Ontario is accurate prior to the event to ensure you receive the program materials.

Course materials for Certificate and Executive programs will be provided on site or via email for any pre-course work.

### Are meals included with the PD seminar?

- Full-day seminars include: Continental breakfast with fruit and yogurt, lunches with entrée, sides, and dessert, coffee, tea, soft drinks, juice, and water.
- Half-day seminars include: Coffee, tea, soft drinks, juice, and water.
- No snacks are served in either full-day or half-day seminars.
- Certificate and Executive programs include: hot breakfast, lunches with entrée, sides, and dessert, coffee, tea, soft drinks, juice, and water and may include dinner or networking events dependent on the program (please see program details for information).
- Please note that while we attempt to be consistent across all facilities used for PD events, the food policy for programs held at offsite locations may vary, depending on the options available at the facility.

### How can I request a vegetarian meal or notify you of a specific food allergy?

Requests for vegetarian meals and information concerning specific food allergies should be communicated during the online registration process in the “special instructions” section.

### Why have the meals changed at my location?

In order to maintain 2016 Professional Development seminar prices in 2017 without impacting course content and in consultation with participant feedback, we have changed our food policies to include:

- Continental breakfasts with fruit and yogurt (except for Executive and Certificate Programs which will include a hot breakfast)
- Lunches with entrée, sides, and dessert
- Coffee, tea, soft drinks, juice, and water

Please note that the facilitators of our programs do not make the food policies or choices. Please note that while we attempt to be consistent across all facilities used for PD events, the food policy for programs held at offsite locations may vary, depending on the options available at the facility.

## PD Passports

### What is the Personal Passport and how much does it cost?

Personal PD Passports for individual CPAs are \$840 + HST and are not transferrable. Once a CPA purchases a passport, it is captured as credit on their account in the [Registration Portal](#). With the credit, a CPA can register for half, full and two-day seminars at the reduced pricing listed below. One Personal PD Passport is the equivalent of three full day seminars (in person). Once the credit on the Personal PD Passport has been used, additional seminars can be registered at a discounted rate of \$280 (plus HST) per day.

Seminars	Personal Passport Pricing - available for CPAs only
Half-day	\$140 + HST
Full day	\$280 + HST
Two day	\$560 + HST

### What is the Organization Passport and how much does it cost?

Organization PD Passports are \$1,980 + HST. Once purchased, a passport is captured as credit the administrators account in the [Registration Portal](#). With the credit, the administrator can register themselves and/or staff for half, full and two-day seminars (in person) at the reduced pricing listed below. The Organization Passport is transferable between anyone in your firm or organization. Once the credit on the Organization Passport has been used, additional seminars can be registered at a discounted rate of \$330 (plus HST) per day.

Seminars	Organizational Passport Pricing - available for non-members and businesses
Half-day	\$165 + HST
Full day	\$330 + HST
Two day	\$660 + HST

### How can an Organization Passport be purchased?

Organization Passport purchase and seminar registrations and withdrawals can only be made through a company designated administrator.

For a non-member administrator, you must first create a contact profile on our [Registration Portal](#).

### How do I check the balance on my Passport?

Members and company designated administrators can check the balance on their PD Passports by clicking on the "PD Passports" tab on the left hand navigation panel.

### Can I register a guest with my Personal PD Passport?

Personal PD Passports are non-transferable and can only be used by the original purchaser. Substitute attendees will be charged the regular or public price.

### How long are the PD Passports valid?

Both the 2017 Personal PD Passport and the 2017 Organization PD Passport are valid until December 31, 2017.

The Passports cannot be extended beyond their expiry date. Any remaining balances will be forfeited to CPA Ontario.

## Withdrawal and Transfers Policies

### How can I withdraw from a PD seminar?

All withdrawals can only be done online through our registration portal.

Withdrawals from seminars registered on an Organization Passport can only be processed by the company designated administrator.

### When is the last day I can withdraw from a PD program?

The withdrawal deadlines are as follows and subject to withdrawal fees. If one wishes to withdraw after the deadline, full charges apply to the program.

Program Type	Withdrawal Deadline	Withdrawal Fee
Seminars (*)	2 weeks prior to start date	\$50 (plus HST)
Certificate/Executive/Conferences	2 weeks prior to start date	\$50 (plus HST)

### Is there a withdrawal fee?

Program Type	Withdrawal Deadline	Withdrawal Fee
Seminars (*)	2 weeks prior to start date	\$50 (plus HST)
Certificate/Executive/Conferences	2 weeks prior to start date	\$50 (plus HST)

(\*) You cannot use the balance on your PD passport to pay the withdrawal fee.

### Can I transfer my seminar registration to a different event of the same value without paying the withdrawal fee?

Yes, transfers between seminars are accepted up to 14 days prior to the seminar without a withdrawal fee.

The transfer request must be made in writing to [pd@cpaontario.ca](mailto:pd@cpaontario.ca).

There are no transfers or cancellations less than 14 days prior to the seminar date.

### After I withdraw from a seminar, do I get a refund?

No, you will receive a credit memo onto your account.

For withdrawals from registrations made on a passport, a credit will go directly back on the passport, even if extra days were registered on the passport.

### How can I make a substitution on an Organization Passport?

Organization Passport registrations can be substituted for another member of the organization.

Advance notice is appreciated.

Please email [pd@cpaontario.ca](mailto:pd@cpaontario.ca) with the substitution.

### Can the PD Passport be refunded?

Under no circumstance can a PD Passport be refunded.

Under no circumstance can unused and expired PD Passport days be refunded. Any remaining balances after the expiry date will be forfeited to CPA Ontario.

### What happens if CPA Ontario cancels a seminar?

CPA Ontario reserves the right to cancel events. Registrants will be notified and a full credit will be issued and appear on your account if an event you are registered to attend is cancelled.

## Registration Instructions

### How can I register for a Personal PD Passport?

Personal PD Passports can be purchased on the [Registration Portal](#).

1. Log in to your account
2. Select “PD Passports” in the left navigation.
3. Follow the prompts to check out and complete payment. The next time you register for an event, the credit remaining in your passport will be automatically applied to your purchase.

### How can I register for an Organization PD Passport?

Note: Organization Passport purchase and seminar registrations and withdrawals can only be made through a company designated administrator. For a non-member administrator, you must first create a contact profile on the [Registration Portal](#). The old Organization registration forms are no longer valid and will not be accepted.

1. Email [pd@cpaontario.ca](mailto:pd@cpaontario.ca) to confirm your firm or organization is on file with CPA Ontario.
2. Administrators will receive an email confirmation, and will have the ability to purchase an Organization Passport.
3. Once the Organization Passport is purchased, the Administrator will be able to register themselves or others into seminars using the Passport.

### How can I register for an event?

Follow the steps below to register for an upcoming event:

1. Use the search tool in the portal to search for events that you would like to attend
2. Select the box beside the event that you would like to attend and click Register Now
3. Login to your CPA Ontario PD account and follow the prompts to checkout and complete payment

If this is the first time you are logging into the [Registration Portal](#), please use your national ID member number.

There is a Tab in the [Registration Portal](#) with more information about your national ID member number.

If you are not a CPA, you may still create an account to register.

If you would like to pay by cheque, or for further information contact us at [pd@cpaontario.ca](mailto:pd@cpaontario.ca) or 1 800 387.0735 x7218.

### How do I get my National ID Number?

You will need your national ID number to log in to the Professional and Executive Development Program online portal. CPA, CAs will use their legacy ID number. CPA, CGAs will use their legacy ID number with a prefix of "8" in front of it. CPA, CMAs will use their legacy ID number with a prefix in front of it. If your legacy ID number is 6 digits, then include a "30" in front of it. If your legacy ID number is 7 digits, then include a "3" in front of it. There are exceptions, so if you are having difficulties logging in, please contact us by phone at 1 800 387.0735 x7218, or by email at [pd@CPAontario.ca](mailto:pd@CPAontario.ca).

If you are a legacy CPA, CMA member who became an affiliate member of CPA Ontario prior to unification (April 1, 2014), or a legacy CPA, CGA member who became an affiliate member of CPA Ontario prior to unification (July 1, 2014), please use the member number you were issued through CPA Ontario.

### How do I find out what my password is?

The first time that you log in, you will need to click on the "forgot my password" button and a temporary password will be sent to the primary email address that is on file at your legacy accounting body.

You will be prompted to set up a new password, and some security questions.

If you forget your password, you can repeat this process at any time.

### Where can I change/update my contact information?

Please log into the [Registration Portal](#) and click the Contact Profile option on the left nav.

## Seminar History and Continuing Professional Development (CPD)

### How/where can I view my seminar history?

You can find history of all programs you registered for after August 1, 2014 in the [Registration Portal](#), by accessing your profile and using the "Event Planning" link on the left side of the screen.

### What are my CPD requirements?

CPD requirements are currently under transition and are dependent upon your legacy designation. Please visit the [CPD Requirements](#) page to determine what applies to you.

## Seminar Presentation Materials

### How do I receive presentation materials for the program i registered for?

Seminar presentations are paperless, with a few exceptions. Participants will be sent an email reminder with a link to our [Blackboard](#) site one week before the program begins. Please ensure your email address on file with CPA Ontario is accurate prior to the event to ensure you receive the reminder and link.

Participants are advised to download the program materials in advance of the course as internet connectivity varies from location. If you wish to print out course materials, please do so before your arrival at the event location.

As of January 1, 2017, seminar printed materials are not available for purchase.

Certificate, Executive and Conferences vary in the types of materials provided. You will be notified by email if there are program materials to download or bring to the event.

### Can I bring my laptop or tablet to the course and view materials electronically?

Yes. Participants are encouraged to download the materials electronically to view them during the seminar.

### Will there be printed copies of materials at the site?

No. Seminar programs will be entirely paperless, with a few course exceptions. Participants will be advised and provided links to paperless course materials ahead of time via the email address they have registered with.

Certificate, Executive and Conferences vary in the types of materials provided. You will be notified by email if there are program materials to download or bring to the event.

Participants are advised to download the program materials in advance of the course as internet connectivity varies from location. If you wish to print out course materials, please do so before your arrival at the event location.

### Can I share my course materials with others (eg. my colleagues, clients etc.)?

No. These materials are protected by copyright, and licensed for use by CPA Ontario. All rights are reserved, no part of this publication/course material may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means (photocopying, electronic, mechanical, recording or otherwise).

## PD Catalogue

### Will the PD catalogue be mailed to me?

CPA Ontario no longer produces a paper catalogue. Our registration portal contains the most up to date information on available programs, and can be accessed at [pd.cpaontario.ca](http://pd.cpaontario.ca).