



## Policy:

Ontario Professional Planners Institute (OPPI) values and respects the privacy of our Members including security of your personal data. We agree to use such information for the purpose collected. This applies to both on and off line information that is collected and used in the course of our activities.

Ontario Professional Planners Institute strives to comply with Canada's Personal Information Protection and Electronic Documents Act. The Act – commonly referred to as the CSA Code – includes, with some modification, the principles set out in the National Standard of Canada Model Code for the Protection of Personal Information, CAN/CSA-Q830-96. The ten overarching principles include Accountability; Identification of Purposes; Consent; Limiting Collection; Limiting Use, Disclosure and Retention; Accuracy; Safeguards; Openness; Individual Access; and Challenging Compliance.

## Collection of Data

Data is collected annually during the membership application and renewal process. Members can use the web site, email, phone and fax to update their information. Reminders to keep information accurate are included in email broadcast messages and other member communications.

Members and non-member data is primarily stored on the Association Information Management System (AIMS) database which is housed offsite with a service provider. This database is used for member mailings, third party mailings (Labels are not sold to third parties. OPPI sends third party material in it's mailings.), broadcast email or fax to whole or subsets of the data base, research surveys, management of professional standards and as deemed appropriate by management staff for other organizational business.

Members who wish to promote their practice to the public through the online Consultants Directory complete a separate survey identifying which data they wished displayed on the OPPI public web site.

Additional data is collected as members and non-members interact with the institute through the web site and as volunteers or in contract positions. The collection of personal information is limited to that necessary for the purposes identified. Consent for the collection of data is obtained as follows:

Implied consent is given upon the completion of the membership application. Opt-out consent is provided for third party mailings. Express consent is provided for sensitive data collected for e-commerce activity or other activity that was not originally defined in the process.

## **Security**

Security safeguards, such as limited access, password protection, encoding and OPPI policies and procedures protect personal information. Members may change their web site password at any time.

## **Member Registry**

The OPPI Registrar maintains a register in which are all the names of members of the Institute in good standing and each member's class of membership.

The register is open to examination by the public at the OPPI head office during normal business hours.

OPPI does not provide a member's personal contact information to the general public.

## **Third Party Access to Data**

Member email or mailing addresses will not be sold or provided to any outside parties. Our Find a Member and Consultants Directory databases have been designed to prevent individuals from easily stripping these online tools for member contact information in order to develop commercial mailing lists.

OPPI does provide mailing services to third parties such as OPPI suppliers and industry. These parties wish to promote special events, inform members of new products and resources. OPPI reviews all materials distributed by third parties prior to sending out a mailing to ensure these are of potential interest to members. If you prefer not to receive these mailings, you may submit in writing to the Ontario Professional Planners Institute.

## **The OPPI Web Site**

### *Using "Cookies"*

The OPPI Members Only web site uses an Internet tool called a "session" cookie. Cookies are small bits of data that we send to your computer to improve your user experience. We use them to track that you have signed in so that you don't have to continually enter your user name and password as you move around the site. This cookie is removed as soon as you log out or close your browser.

## *Tracking IP Addresses*

An IP address (Internet Protocol Address) is a number that's automatically assigned to your computer whenever you are using the Internet. Web servers – the computers that “serve up” Web pages – identify your computer by its IP address. We collect IP addresses for the purposes of system administration, to report aggregate information to our institutional customers, and to audit the use of our site. When you request pages from Members Only, our servers log your IP address. We do not normally link IP addresses to anything personally identifiable, which means that a user's session will be logged, but the user remains anonymous. We can and will use IP addresses to identify a user when it is deemed necessary to enforce compliance with our Terms of Use and License Agreement or to protect our service, site, customers, or others.

### **Summary**

Please be assured that we take member privacy seriously, and make every reasonable effort to protect it. You can confirm and update the accuracy of the information collected from you by clicking the “Your Profile” tab found at the top of each page within the Members Only web site. If you have questions or comments about our member privacy policy, please contact [info@ontarioplanners.on.ca](mailto:info@ontarioplanners.on.ca).