• CLIENT TRACK •

TAKE CONTROL OF YOUR PRACTICE

• MANAGEMENT SOFTWARE SOLUTION FOR ACCOUNTING PROFESSIONALS •

Disclaimer:

This presentation represents a discussion of the Canadian PIPEDA privacy policy and how it relates to security, client information and accounting professions but does not represent a formal legal opinion.

The presenter, David Merritt is not a legal expert and does not claim to be so any formal business decision you make around implementing policies and procedures involving PIPEDA privacy should also involve formal advice from a legal expert

Our presentation today…

We are going to discuss:

- What is PIPEDA
- What that means for your business
- What Security and Encryption you should use
- Client Track Portal as a tool to implement secure practices

PIPEDA in a nutshell

The Personal Information Protection and Electronic Documents Act (PIPEDA) is a Canadian law that governs how private sectors collect, use, and disclose personal information in commercial activities.

PIPEDA protects the privacy of internet users and their personal data. It stipulates that organizations are not allowed to use the information that they collect for any purposes other than what was agreed upon at the time of collection.

This also means that the information cannot be shared with any third parties unless express consent is obtained. Businesses must be completely transparent regarding how any personal information collected by them will be used and there must be a system in place for obtaining the consent of the users.

Examples of the Type of Information to protect:

- Name
- Age
- ID Numbers
- Income
- Ethnic Origin
- Social Status
- Financial Information
- Opinions / Comments
- Evaluations
- Intentions
- Employee Files
- Credit Records
- Loan Records
- Medical Records

10 Core Principles

Accountability

- Accounting professionals are required to accept responsibility for any and all personal information that is under your control.

  The business is further required to use various means, including contractual, to ensure that it remains compliant with third parties. It also has a responsibility to uphold PIPEDA by developing and implementing relevant policies and procedures.

10 Core Principles

Identifying Purposes

- Accounting professionals are responsible for identifying and documenting their purpose and processes and procedures for collecting personal information.

  You are required to notify your customers, clients, and guests if you intend to use the information for any purpose that was not identified at the time of collection.

10 Core Principles

Consent

- Accounting professionals are responsible for obtaining the informed consent of individuals when it is engaged in the practice of collection of personal information or data.

10 Core Principles

Limiting Collection

- Accounting professionals are responsible for limiting the collection of personal information to only what is necessary for purposes identified by the organization. All collection methods should be fair and compliant with all applicable laws.

10 Core Principles

Limiting Use, Disclosure, and Retention

- Accounting professionals are responsible for never using or disclosing personal information for any purpose other than that for which it was collected. You are to retain any personal information collected for only as long as is necessary to fulfill the intent or purpose of the collection.

10 Core Principles

Accuracy

- Accounting professionals are responsible for ensuring that all information is accurate, complete, and up to date. It should be only what is necessary or required for the purpose or intent of use.

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10 Core Principles

Safeguards

- Accounting professionals are is responsible for protecting personal information by ensuring that reliable security safeguards that are appropriate for the level of the information’s sensitivity are in place.

10 Core Principles

Openness

- Accounting professionals are responsible for complete transparency regarding its policies and management of collected personal information. The policies should be very detailed in explaining how it manages personal information and these policies should be readily available for both employees and clients.

10 Core Principles

Individual Access

- Accounting professionals are responsible for providing, upon written request, the existence, use, and disclosure of an individual’s personal information. You must also give those individuals access to the information that has been collected and they must be given the opportunity or option to challenge the accuracy of it and have it amended appropriately.

10 Core Principles

Challenging Compliance

- Accounting professionals are responsible for providing a platform for individuals to address challenges PIPEDA compliance with the core principles. The designated individual or team that handle’s an organization’s compliance will be the point of contact for individuals who are challenging the compliance issues.

PIPEDA in a nutshell

You MUST:

- Be accountable for all of your clients' information
- Be able to give a complete audit report to your client upon request of where all of their information is and how you have used it
- Show that you are using acceptable security technology when sending and storing your clients information

PIPEDA in Canada and Abroad

- PIPEDA recognizes that it is not technically possible to confine data to just Canada so it does not restrict information to just Canada
-PIPEDA recognizes that technology changes and evolves so there is no current 'acceptable' security details written into the legislation
- PIPEDA recognizes no contract, no matter how well crafted, can override the laws of the foreign jurisdiction

What is Acceptable Security?

Acceptable Security Measures

Password Protected Sending

Encrypted Content

Encrypted File Sharing (In transit and in storage)

The HUMAN factor and Security

Human Beings are the weak point for security:

-We cannot remember acceptable passwords

-We are impatient with technology

-Many people don’t appreciate security and their privacy

-Everyone wants quick convenience

CLIENT TRACK PORTAL

Client Track Portal is an **optional cloud based add-on that works with our existing Client Track** desktop software so that you can access your information on the go through a browser based portal or a phone app.

CLIENT TRACK
(Desktop)

CLIENT TRACK PORTAL
(Cloud-based add-on)

Security

- **CLIENT TRACK PORTAL –** Is hosted on entirely Canadian Servers and is hosted by Microsoft Azure which gives us the security backing of not only a huge reputable company, but also the shared security knowledge of the hundreds of thousands of companies also using Azure

Security

- There IS NO backdoor. AND we encrypt our data twice

Security

- We use Password hash technology so your passwords are not stored on our system at all

Security

- All files and information is encrypted while in transit and in storage at all times using AES 256 bit encryption

  We use an encryption management system such that the encryption keys themselves are not stored anywhere in our system so it is not possible for a hacker to get access to the keys to decrypt any files

Client Track understands your needs, unique pressures and challenges in the accounting industry. We've developed a software solution that's intuitive and works the way you do.

Free live demo(s) with support representative:

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