# TRAINING PROGRAM

## ACCESS TO INFORMATION AND PRIVACY – FEDERAL INSTITUTIONS (ATIPTP-FI)

THE PROGRAM
IS AN ADDITIONAL
PROFESSIONAL ASSET
FOR YOU!

**MODULE A**
**INTEGRATION TO THE ATIP ANALYST FUNCTION**

**AAPI**
Association des professionnels en accès
à l'information et en protection de la vie privée
Association of Access to Information and Privacy Professionals

The attestation issued jointly by the Université de Montréal and the AAPI recognizes the training of each participant in the Program and is a guarantee to the employer of the quality of the training received.

Université de Montréal FEP

AAPI

Association des professionnels en accès à l'information et en protection de la vie privée

Association of Access to Information and Privacy Professionals

# TRAINING PROGRAM

ACCESS TO INFORMATION AND PRIVACY –
FEDERAL INSTITUTIONS (ATIPTP-FI)

## THE PROGRAM THAT WILL MAKE A DIFFERENCE FOR INSTITUTIONS AND THEIR EMPLOYEES

Do your employees need to acquire knowledge about ATIP rules and best practices in relation to the needs and realities of your institution? Do you want to support them in developing their skills as ATIP analysts?

In 2019, the AAPI released for the first time the French course **Intégration à l'emploi des analystes fédéraux**. Based on the feedback received from participants, observers and coordinators, the training program was updated and enriched to better meet the specialized ATIP training needs.

### THE PROGRAM NOW INCLUDES TWO MODULES :

**Module A** **Integration to the ATIP Analyst function,** which is open to all new employees and those with less than two years experience in an ATIP office.

**Module B** **ATIP Development,** which is open to any employee with two or more years of experience in an ATIP office or who has completed Module A. Module B is currently under development.

In 2021, the AAPI makes available to federal institutions the first module of the program, **Integration to the ATIP Analyst Function**.

### THE PROGRAM THAT MEETS EXPECTATIONS FOR ATIP ANALYSTS

- Mastering ATIP issues
- Acquiring an integrated and practical knowledge of the legal framework
- Implementing the acquired knowledge
- Exercising leadership in the establishment of good ATIP practices
- Exchanging with other analysts on the ATIP function and practices

### THE PROGRAM THAT OFFERS UNDENIABLE BENEFITS TO FEDERAL INSTITUTIONS

- Training their employees according to a flexible and adapted ATIP service offer
- Developing their skills in order to optimize the processes in these matters.
- Accessing a knowledge base and best practices in ATIP
- Gaining expertise in a specialized field

In an effort to provide the best in training, the AAPI engages experienced specialists and practitioners to participate in the design and development of its ATIP training programs as trainers, expert members of the Skills Development Advisory Committee and the Reading Committee, or members of the production team.

The ATIP Training Program offered to federal institutions is distinguished by its content, the professional quality of the trainers and its pedagogical approach that encourages active participation, using concrete situations punctuated by practical solutions and proposing procedures for the immediate application of knowledge. The Program is accredited by the Faculté de l'éducation permanente of the Université de Montréal, which allows participants who meet the requirements of the ATIPTP-FI to receive an attestation in the form of continuing education units.

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## ORIENTATION AND OBJECTIVES OF MODULE A

**ORIENTATION**

**Promote the integration of ATIP analysts to the function by developing the essential skills required to carry out the tasks assigned to them.**
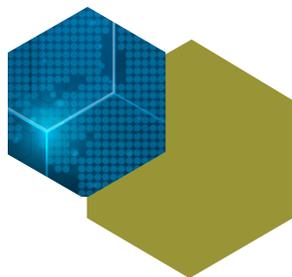
**OBJECTIVES**

- Transmit knowledge related to obligations, standards and expected practices according to the degree of complexity of the tasks assigned
- To present recommended ATIP practices related to the needs and realities of federal institutions.
- Facilitate the integration of knowledge through practical exercises, case studies, tools and procedures related to the job tasks.

## THE SKILLS TO BE ACQUIRED

**By the end of Module A, participants will have acquired the following skills:**

- Knowing the legal framework for ATIP: legislation, regulations and policy instruments
- Knowing the role and responsibilities of the institution and the ATIP officer
- Knowing how to apply the legal framework relating to the processing of requests: admissibility and exceptions to the right of access
- Knowing how to process requests under the ATIA and the PA within the requirements and constraints, such as timelines
- Knowing how to recognize potential situations where privacy may be invaded in the performance of their duties

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## MODULE A – INTEGRATION TO THE ATIP ANALYST FUNCTION

## OVERVIEW

### DELIVERY OF MODULE A COURSES

Module A is 42 hours in length and is broadcast over a period of 5 weeks. Each day of the course, lasting 7 hours, is broadcast by videoconference from 8:30 a.m. to 4:30 p.m. In addition to the health breaks and lunch period, short 5-minute breaks are inserted during the day to avoid participants having to maintain continuous attention for 2 consecutive hours of videoconference broadcasts.

### WEEK 1

| | |
|---|---|
| **COURSE 1 | 1 DAY** | The Legal and Institutional Framework for Access to Information and Privacy |
| **COURSE 2 | 1 DAY** | The Application of the Legal Framework into the Processing of Communication or Correction Requests |
| **COURSE 3 | 1 DAY** | The Processing of Communication or Correction Requests |

### WEEK 2

Break in order to allow transfer of the learned elements to the workplace

### WEEK 3

| | |
|---|---|
| **COURSE 3 | 2 DAYS** | The Processing of Communication or Correction Requests |

### WEEK 4

Break in order to allow transfer of the learned elements to the workplace

### WEEK 5

| | |
|---|---|
| **COURSE 3 | ½ DAY** | The Processing of Communication or Correction Requests |
| **COURSE 4 | ½ DAY** | Introduction to Privacy |

### THE METHODOLOGY

Module A of the ATIP Training Program – Federal Institutions, **Integration to the ATIP Analyst Function**, is designed to develop core competencies by building on the practice of access to information and privacy. All the courses are taught by ATIP experts who use a pedagogical approach that focuses on active participation, using concrete situations punctuated by practical solutions and proposing means for the immediate application of knowledge. Some courses may require prior reading and exercises; the trainer will expect all participants to have completed the required preparation.

Moreover, practical workshops are integrated into the module so that participants can apply methods and best practices, and develop their reasoning and reflection with regard to situations similar to their reality. This learning formula promotes a better integration of knowledge and know-how, and allows participants to increase their professional expertise and autonomy.

### RECOGNITION AND EXAM

**Attestation issued by the AAPI and the Université de Montréal**

Certification will be granted upon successful completion of Module A - Integration to the ATIP Analyst Function. In order to obtain the attestation from the Université de Montréal and the AAPI, the participant will have to pass the exam after having completed all the courses of the module. In the event of an absence from one or more Module A courses, the participant will be able to retake the course(s) and write the exam at a subsequent Module A session.

In order to obtain the ATIP certification, the participant will have to pass an exam offered online by the Université de Montréal. The exam, developed by a committee of ATIP experts in collaboration with the Université de Montréal, Faculté de l'éducation permanente, reflects the learning objectives of each course in the module. It assesses the participant's knowledge and skills based on choice of answer questions. The participant will have a limited amount of time to complete the exam online.

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## MODULE A – INTEGRATION TO THE ATIP ANALYST FUNCTION

### COURSE 1 - 1 DAY

#### THE LEGAL AND INSTITUTIONAL FRAMEWORK FOR ACCESS TO INFORMATION AND PRIVACY

In this course, participants will learn about the legal and institutional framework within which the federal institution and its head of ATIP operates.

The *Access to Information Act (ATIA) and the Privacy Act (PA)*, regulations and policy instruments will be presented. Links will be made between these texts to ensure that the ATIP rules are known and easily understood by the participant. Legal concepts and rules related to the processing of access and correction requests will be presented in more detail in course 2.

At the institutional level, participants will learn about the role and responsibilities of the federal institution and its head. They will also gain an overview of the role of other stakeholders, including the Treasury Board, the Information Commissioner and the Privacy Commissioner, in the implementation and enforcement of the two Acts.

#### GENERAL OBJECTIVE

Know the legal and institutional environment in which the federal institution and its head operate, and understand its objectives.

#### LEARNING OBJECTIVES

- Describe and explain the objectives of the ATIP legislation
- Comparing and Differentiating the ATIA and the PA and their Regulations
- Describe the normative framework (policy instruments) for ATIP and establish links between legislation and policy instruments
- Describe and explain the role and responsibilities of the government institution and its head
- Describe and explain the roles and key responsibilities of stakeholders in the implementation and enforcement of legislation

#### COURSE PLAN (an overview)

- The Foundations, Values and Objectives of the ATIP Legislation
- The ATIA and the PA: Overview, Complementarity of the Acts
- Regulations and Policy Instruments: General Overview
- The Federal Institution: Typical Organization, Status, Role and Responsibilities
- The person in charge: delegation, role and responsibilities
- Key Players in Implementation and Enforcement: Overview of their Role

### COURSE 2 - 1 DAY

#### THE APPLICATION OF THE LEGAL FRAMEWORK INTO THE PROCESSING OF COMMUNICATION OR CORRECTION REQUESTS

During this course, participants will be introduced to the legal concepts and notions necessary to process requests under the ATIA or the PA, such as the notions of records and personal information, to determine compliance. They will review the conditions under which all exceptions to access to records and personal information, both discretionary and mandatory, apply and the principles for applying these exceptions in relation to the purposes of the Act.

#### GENERAL OBJECTIVE

Explore the legal concepts required to process requests to establish compliance and to identify exceptions to the right of access and restrictions on exceptions, documenting the conditions under which they apply.

#### LEARNING OBJECTIVES

- Describe key concepts related to the processing of applications
- Differentiate the types of exceptions
- Identify exceptions and explain the conditions of application of each one
- Set out the restrictions on the application of exceptions and their conditions
- State and explain the principles of application of the exceptions

#### COURSE PLAN (an overview)

- The right of access to documents: documents covered, documents excluded, procedures for exercising the right of access
- The right of access to personal information: information covered, documents excluded, how to exercise the right of access
- Conditions for the application of exceptions to the disclosure of documents
- Conditions for the application of exceptions to the disclosure of personal information
- Restrictions on the application of exceptions

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## MODULE A – INTEGRATION TO THE ATIP ANALYST FUNCTION

### COURSE 3 - 3 ½ DAYS

**THE PROCESSING OF COMMUNICATION OR CORRECTION REQUESTS**

In this course, the process, procedural requirements and good work practices will be seen in detail and put into practice. Emphasis will be placed on the technical aspects of processing all types of applications and on the complete processing (up to the decision) of simple applications.

An important part of the course will be devoted to experimentation. Participants will have to analyze applications and documents by applying the knowledge acquired in this course and in courses 1 and 2. These cases will enable them to further master standards and procedure, and to develop reasoning and reflection with regard to situations similar to reality.

Thus, this course aims to ensure that participants develop methods that will enable them to present a properly documented file to the person in charge according to the action to be taken.

**GENERAL OBJECTIVE**

Process access and correction requests in an efficient and structured manner, respecting legal requirements and the policies of the government institution

**LEARNING OBJECTIVES**

- Assessing the admissibility (compliance) of requests under the ATIA and the PA
- Follow procedures for handling requests for access to documents and personal information and requests for correction of personal information
- Assist the requester
- Apply a method of document analysis and sampling that facilitates decision making by the manager
- To document and formulate draft decisions for simple applications

**COURSE PLAN (an overview)**

- The head and the ATIP Office: its mission, roles and responsibilities
- Application of access and correction procedures
- Handling of complaints relating to access and correction requests

### COURSE 4 - ½ DAY

**INTRODUCTION TO PRIVACY**

During this course, participants will be introduced to the protection of personal information in the performance of their duties. They will learn about the main protection principles and the limits set by the PA on the collection, use and disclosure of personal information to third parties.

The importance of ensuring the protection of personal information will be demonstrated to them by analyzing situations that involve privacy risks in their work. They will learn how to report a privacy breach and how the government institution should deal with such an incident.

Thus, this course aims to develop good privacy reflexes in participants. They will also be made aware that the privacy is everyone's business and that their contribution is important.

**GENERAL OBJECTIVE**

- Be familiar with the principles of privacy and the key obligations under the Privacy Act.
- Identify potential privacy breach situations and apply the breach management procedure according to his or her level of responsibility

**LEARNING OBJECTIVES**

- Describe the rights conferred by the PA to the person concerned
- Describe the life cycle of personal information and related privacy principles
- Identifies potential privacy breaches in the course of his/her duties and applies the breach management procedure according to his/her level of responsibility

**COURSE PLAN (an overview)**

- Privacy's Principles for the Life Cycle of Personal Information
- The rights conferred by the PA
- Privacy breaches, breach reporting and the procedure for managing a breach of confidentiality

## Professional Career Path of the developers and the trainers for ATIPTP-FI

### Ms. Danielle Corriveau,
**ATIP Consultant**

Ms. Corriveau holds a law degree from the Université de Montréal and was a member of the Bar from 1977 to 2012. She worked for nearly 35 years in the Quebec public administration as legal counsel and assistant to senior public servants. She worked for more than 10 years as ATIP manager and coordinator at Retraite Québec and Revenu Québec.

Since then, Ms. Corriveau has acted as a consultant in the fields of access to information and privacy. She is also a trainer and responsible for the Practical Guide to Access and Protection of Information at the Association of Access to Information and Privacy Professionals (AAPI). She has sat on the Selection Committee for the selection of persons eligible for appointment as members of the Commission d'accès à l'information du Québec (2013). In 2019, she acted as trainer and coordinator of the first edition of the ATIP Training Program for Federal Institutions for the AAPI. She also acted as a trainer for the French version of the 2021 edition.

### Ms. Marie-Claude Juneau,
**ATIPTP-FI Coordinator**

A graduate in computer science from the Cégep de Trois-Rivières, the Canada Revenue Agency's Middle Management Development Program and the Federal Government Leadership Program, Ms. Juneau now has over 35 years of experience in the federal public service, including 11 years in access to information and privacy (ATIP). Her experiences have allowed her to develop a solid expertise in ATIP management and coordination, employee management and training, as well as financial management and fund injection.

Recently, Ms. Juneau has been acting as a consultant to certain federal departments in the ATIP field and as coordinator of the ATIP Training Program – Federal Institutions (ATIPTP-FI) for and on behalf of the Association of Access to Information and Privacy Professionals (AAPI). She also acts as a trainer for the ATIPTP-FI of the AAPI.

## WHO ARE WE?

The Association of Access to Information and Privacy Professionals, commonly referred to as "AAPI", is a non-profit organization (NPO) that brings together more than 550 ATIP professionals from the Quebec public administration. In 2019, 35 federal ATIP analysts became members of AAPI. Its mission is to foster the development and leadership of access to information and privacy professionals. Its 30-year history enables it to provide ATIP professionals with expertise and support to foster effective and consistent ATIP practices, taking into account the expectations of citizens and the obligations of the legal framework.

## EXCELLENT REASONS TO BE AN AAPI MEMBER

**Do you want to stay abreast of what's going on in the area of access to information and privacy, develop the skills of your staff, and ensure that you fully participate in the implementation of best practices in these areas within your organization? The AAPI offers you all this and more!**

Your employee's membership in the **Association of Access to Information and Privacy Professionals** (AAPI) not only gives him access to the products and services offered, but also allows him to develop his skills through his participation in the ATIPTP-FI program and to obtain a certificate issued jointly by the Université de Montréal and the AAPI. In addition, membership allows him to benefit from consulting services and leading-edge expertise in ATIP.

**A proactive and passionate team!** Our team of skilled professionals and expert practitioners is at your service to help you increase your efficiency and that of your organization on a daily basis.

Ms. Marie-Claude Juneau, an experienced individual who has worked in federal institutions, recently joined our team as ATIPTP-FI Coordinator. Her presence is an invaluable asset in all matters related to research and development of training programs for the staff of federal institutions. She will be able to assist you in the operational management of access to information and in the development of rules and practices governing the management of ATIP within the framework of the ATIPTP-FI program.

**AAPI SATELLITE OFFICE IN OTTAWA**
Marie-Claude Juneau,
*ATIPTP-FI Coordinator, AAPI*
mcjuneau@aapi.ca or 819-209-7877

Finally, the AAPI is:

- An extensive and effective digital presence

- A state-of-the-art offer in skills development through various training programs and activities

- Recognition from the university community and certain professional orders, such as the Faculté de l'éducation permanente of the Université de Montréal, the Quebec Bar, the Chambre des notaires and the Ordre des conseillers en ressources humaines (CRHA).

- Various specialized tools tailored to the needs of professionals.

- An association that listens to and serves organizations – Our team of expert practitioners can perform the analysis, evaluation and implementation of management processes and control measures for the implementation of good practices.

- Advantageous membership fees

Learn more about membership privileges, services and skills development activities by visiting **www.aapi.qc.ca**.

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