

## Personal Data Protection Policy

The personal data provided by the candidate will be used for administrative and communicative purposes relating to the examination. Failure to provide complete and accurate information may affect the provision of administrative services to the candidate. The Institute will keep the personal data provided confidential, but may need to disclose it to appropriate personnel in the Institute and other relevant parties engaging in the provision of examination services to the Institute. Candidates have the right to request access to and correction of their personal data. For details, candidates can contact the Institute.

Participants are advised to read the Policy of Personal Data Protection in **Appendix 1** to understand their rights and obligations in respect of the supply of personal data to HKIB and the ways in which HKIB may use or handle such data.

## Appendix 1: Personal Data Protection Policy

When HKIB collects information from participants in our activities, training programmes and/or examinations (“Participants”), it is our policy to meet fully the requirements of the Ordinance, which regulates the treatment of personal data. Throughout this policy, the meaning of the term “personal data” is as defined in the Ordinance. In dealing with personal data, we will ensure compliance by our staff with the standards of security and confidentiality prescribed under the Ordinance.

1. All information of a personal nature obtained by HKIB is for the purposes of administering our services, which may include, but are not limited to: training, examinations and other activities organised wholly or in part by HKIB; conducting subsequent performance assessments; and handling related irregularities, if any.

The personal data is supplied either by Participants themselves or from external sources, including, but not limited to: employers, service or learning providers; third parties that are otherwise affiliated to the service in which Participants are involved, and, who may provide HKIB with relevant information on their employees, members and/or students; and members of the public.

After the data obtained from Participants have been captured, processed and checked, hard copies – for example, of Participants’ information checklists or Attendance Notices – may be produced for all HKIB services in order to ensure the accuracy of the data. Some data may also be used for the following purposes during registration and/or payment:

- ♦ To verify Participants’ identities;
- ♦ To fulfill Participants’ specific requests, applications or enrolments relating to our services;
- ♦ To administer and deliver information about the service;
- ♦ To maintain and process examination marks and results, if any;
- ♦ To process and handle Participants’ complaints, enquiries, feedback or irregularities, if any;
- ♦ To maintain Participants’ records;
- ♦ To conduct research or statistical analysis;

- ◆ To release information to relevant third parties on whose behalf HKIB administers, conducts or organises services, and to any third party that HKIB engages to administer and/or conduct services for and on behalf of HKIB;
  - ◆ To promote and provide various HKIB member services to Participants;
  - ◆ To serve other purposes as permitted by law; and
  - ◆ To serve any other purposes as may be agreed between the Participants and HKIB.
2. HKIB will keep the personal data of Participants' confidential. Nevertheless, as part of its operations, HKIB may compare, transfer or exchange their data with the data already in HKIB's possession, or obtained hereafter by HKIB, for these or any other purposes.
  3. HKIB is also professionally obliged to process the personal data fairly, confidentially and lawfully.
  4. The provision of personal data or any information is voluntary. However, failure to provide the requested personal data may result in HKIB being unable to process Participants' requests, perform its statutory functions or deliver its services to Participants.
  5. HKIB may contact a Participant if we require confirmation of his/her identity, or further information about the data requested that may assist HKIB to locate his/her personal data before complying with his/her request.
  6. HKIB will only use the data for specifically or directly related purposes, as outlined on its enrolment form and the accompanying explanatory notes, if any. No exception to this rule is permitted without the express permission of HKIB.
  7. HKIB recognises the sensitive and highly confidential nature of much of the personal data that it handles, and maintains a high level of security in its work. HKIB has well-established guidelines and procedures for maintaining the security of all personal data, both as hard copies and in computer-readable form.

8. HKIB will do its best to ensure compliance with the Ordinance by providing guidelines to and monitoring the compliance of the relevant parties. However, HKIB cannot control how third parties use Participants' personal information and assumes no responsibility for the privacy protection provided by such third parties.
9. The means of Participants' communications with HKIB, including online, by email, by text message (SMS), via HKIB's customer hotline or otherwise, may be recorded and retained for training and record-keeping purposes. Records may be used to monitor the quality of the assistance given and to verify the matters discussed.

Personal data protection in regions outside Hong Kong would be subject to the requirements of these jurisdictions.

## Responsibility and Rights of Candidates

Participants are required to keep HKIB informed of any changes in their personal data once they have enrolled as Participants for services offered by HKIB or for an examination, and until such time as the service is completed or Participants have completed the examination. HKIB has well-established procedures to verify and to process the amendment of Participants' particulars. After the data obtained from the enrolment forms have been captured, processed and checked, hard copies – for example, of Participants' information checklists or Attendance Notices – may be produced for all services offered by HKIB in order to ensure the accuracy of the personal data.

Participants may have the right, under the Ordinance, to request access to, or correction of any data provided by them as per the manner and limitations prescribed therein. As the Ordinance allows, HKIB has the right to charge a reasonable fee for processing any request for data access.

Participants who request access to data or the correction of their data should do so in writing to HKIB. Participants should also write to HKIB if they do not want to receive any information on services offered by HKIB.

## Data Retention

Unless otherwise agreed, hard copies of any documents containing Participants' personal data that they have provided to HKIB become the property of HKIB. HKIB will destroy any documents it holds in accordance with its internal policy and applicable laws.

Personal data will be retained only for such period as may be necessary for carrying out the purposes stated in this policy or as otherwise specified at the time of collection. In some circumstances, HKIB may retain certain records for other legitimate reasons, including to resolve any potential disputes, cross-check against future examination enrolment, if applicable, and to comply with other reporting and retention obligations.

## Transfer of Personal Data Outside of Hong Kong

At times it may be necessary and prudent for HKIB to transfer certain personal data to places outside Hong Kong SAR, in order to carry out the purposes, or directly related purposes, for which the personal data were collected. Where such a transfer is performed, it will be done in compliance with the requirements of the Ordinance.

## Amendments

HKIB reserves the right to change or modify its privacy policy at any time and without prior notice. Any such change or modification shall be effective immediately upon posting of the changes and modification on this website.