

C-PIA

Step-by-Step User Manual

A practical guide for completing your C-PIA task without reading the full User Guide

WHO THIS GUIDE IS FOR

Teachers, staff, Reviewers, and other users who receive a C-PIA email and need to know what to do next. This guide intentionally focuses on actions rather than system administration.

THE ONE-MINUTE VERSION

Open the C-PIA email → click the Item Link → check the flag → review the required information → add comments/conditions if needed → click Submit. If the flag is RED or ORANGE, wait for instructions unless Additional Review is assigned.

Based on: Classroom PIA User Guide, Version 3.0, October 2025

Prepared as a simplified operational guide

1. Start Here: Which Situation Are You In?

If you...	Go to...	Your main action
Want to submit a new resource	Section 2	Open the C-PIA request form page, fill out the resource information and privacy-related information, and submit.
Submitted a resource and received a review email	Section 3	Open the Item Link and review the request.
Are a Reviewer	Section 4	Review the resource, Privacy Policy, and Terms of Use.
See a Yellow or Green flag	Section 5	Attempt resolution and document what you found.
See a Red or Orange flag	Section 6	Do not resolve unless instructed.
Received an Additional Review email	Section 7	Follow the Approver's specific instructions.
Are an Approver	Section 8	Review the recommendation and choose the appropriate outcome.
Are a Finalizer	Section 9	Check the final information and submit.
Are unsure or stuck	Section 10	Use the troubleshooting and help links.

Quick rule

WHEN IN DOUBT

Do not use a resource when you are unsure about information submitted through C-PIA. Contact the district staff responsible for the C-PIA process for assistance/advice.

Official C-PIA resources

C-PIA Managed Solution: <https://focusedresources.ca/privacy-technology/classroom-pia-model>

C-PIA Training & Change Management: <https://focusedresources.ca/privacy-technology/resources/classroom-pia-training-and-change-management>

Focused Education Resource Centre: <https://focusedresources.ca/privacy-technology/resources>

Selecting Learning Resources Support: <https://focusedresources.ca/selecting-learning-resources-support>

2. For Submitters: How to Submit a C-PIA Request

This section is for teachers and staff who want to introduce a new digital resource into their classroom.

Before you start

You need	Why it matters
The resource's Terms of Use link	Reviewers cannot assess the tool without it.
The resource's Privacy Policy link	This is the primary document used to identify privacy flags.
The name of an aware administrator (if school-wide or multi-classroom use)	Required for school-wide, department, or multi-classroom requests.

TIP:

If you cannot find the Terms of Use or Privacy Policy on the vendor's website, use the **Request for Assistance** option in the C-PIA Form. Do not guess or submit without documentation.

Step-by-step: Submit the C-PIA Form

Step 1 — Open the C-PIA Form

Go to: District website → Staff Resources → District C-PIA → **C-PIA request form**.

Step 2 — Enter the resource information

- Resource name
- How the resource will be used
- Target age/grade group
- Whether the resource is a generative AI tool
- Whether it is for school-wide, department, or multi-classroom use

Step 3 — Add documentation links

- Paste the **Terms of Use** link.
- Paste the **Privacy Policy** link.
- If the documents have different names or are combined, add whichever link(s) are available.

Step 4 — Confirm school-wide use (if applicable)

If the Level of application is "School-wide, Department, or Multi-Classroom Use," enter the name(s) of the administrative personnel who are aware of this request.

Step 5 — Confirm resource quality

You will be asked whether you have reviewed and can confirm the quality of the learning resource (curriculum match, effective design, suitability based on social considerations).

- Select **"Yes to all of the above"** to proceed.
- If you cannot confirm quality, the submission will not proceed as a standard review.

Step 6 — Submit

Click **Submit**.

What happens next?

Scenario	What you will see	What to do
1. No Flags	You receive an immediate email confirming the resource can be used.	No further action needed. Follow the conditions listed in the email.
2. Flags detected (Green, Yellow, Orange, or Red)	The request enters the district review process. You will receive updates by email.	Wait for the review result. Do not use the resource until you receive an approval email.
3. Not sure if personal information is involved	Use Request for Assistance in the form.	Contact your district C-PIA staff for advice. The submission will not be recorded.
4. Cannot install the app to review quality	Use Request for Assistance in the form.	Contact your district C-PIA staff. The submission will not be recorded.

IMPORTANT

Do not use a resource while its C-PIA review is still in progress. Wait for the official result email.

When you receive the result email

Result	Meaning	Your action
1. Approved / Can use	The resource passed review.	You may use the resource. Follow any Conditions of Approval listed in the email.
2. Not Approved / Use not suggested	The resource has unresolved privacy concerns.	Do not use the resource. Contact district staff if you need an alternative.
3. Special permission needed	The resource can be used under district-specific conditions.	Follow the district's special-permission process.
4. Changes in use	If you later change how the resource is used, add integrations, or the vendor updates its policy.	A new C-PIA submission may be required. Contact district staff if unsure.

QUICK RULE FOR SUBMITTERS

If you are unsure about anything — whether the tool uses personal information, whether it needs a new review, or whether you can use it — do not guess. Contact your district C-PIA staff.

Conditions you may see in a "No Flags" result email

The default C-PIA result email includes the following standard conditions:

- When using the resource, avoid volunteering any further personal information.
- The use of generative AI resources may be subject to additional guidelines.
- Changes in use, enhancements, or integrations may necessitate a new PIA.
- Appropriate personnel need to have been indicated for resources intended for school-wide, departmental, and multi-classroom application.

THREE-YEAR EXPIRY:

Every C-PIA submission expires after three years. After that date, the resource must be resubmitted and re-reviewed through the C-PIA process.

Submitter checklist

- I found and included the Terms of Use link.
- I found and included the Privacy Policy link.
- I confirmed the target age/grade group.
- I indicated whether this is a generative AI tool.
- For school-wide use: I listed the aware administrator.
- I confirmed resource quality (curriculum, design, social considerations).
- I clicked Submit and received a confirmation.

3. Step-by-Step: Start From Your C-PIA Email

Most users will begin when C-PIA sends an email. The email tells you which role you have and what action is required.

Step 1 — Open the C-PIA email

1. Open the C-PIA email you received.
2. Read the subject and instructions. Common messages include a review request, assignment request, approval request, or finalization request.
3. Click the Item Link provided in the email.

TIP

Use the link in the C-PIA email whenever possible. It takes you directly to the resource record you need to work on.

Step 2 — Check the resource record

- Resource name
- How the resource is intended to be used
- Target age/grade group
- Whether the resource is a generative AI tool
- Whether it is intended for school-wide, department, or multi-classroom use
- Any questions that are still unanswered

Step 3 — Find the first unanswered question

For a review, start with the first C-PIA question that is still incomplete. The User Guide identifies an uncompleted question with a dash (–).

Step 4 — Locate the vendor information

- Find the resource's Terms of Use.
- Find the Privacy Policy. The documents may have different names or may be combined.
- If the documents are divided into multiple privacy/child-specific documents, review the relevant documents needed to answer the C-PIA questions.

Step 5 — Complete your assigned work

DO THIS

Review → document what you found → update the required fields → click Submit.

4. What to Review

You do not need to memorize the privacy questions. Use the C-PIA questions and the vendor's Terms of Use / Privacy Policy as your checklist.

Five practical questions

#	Question	What to look for
1	Is there a Terms of Use and/or Privacy Policy?	Confirm that the required documentation is available.
2	What personal information is involved?	Look for what information is collected, used, stored, or shared.
3	How is the information protected?	Look for information about security and data protection.
4	Who can receive or access the information?	Look for third-party sharing, integrations, and public visibility.
5	Are there restrictions or conditions?	Check age restrictions, deletion limitations, appropriate-use language, or other conditions.

Use the Analysis Checklist

The C-PIA User Guide identifies an [Analysis Checklist](#) (**Focus ED**) as a support for analyzing the Terms of Use and Privacy Policy. If your district provides the checklist, use it rather than creating your own review notes.

IMPORTANT

A C-PIA review is not just a technical review. The Reviewer may need to consider privacy, intended use, age group, school-wide use, and other flagged conditions.

When a new flag appears

Reviewing the documentation may reveal additional flags. The overall flag and Result may update after a short delay. Re-check the item before submitting.

5. Understanding the Flags

This is the most important page to remember.

Flag	What it means	What you do	Do NOT do
GREEN	A review issue was identified, but resolution can be attempted.	Review the issue and try an appropriate resolution.	Do not ignore the issue.
YELLOW	A Terms of Use / Privacy Policy concern needs review.	Review documentation and attempt resolution.	Do not approve the resource yourself.
ORANGE	An additional privacy/process concern has been identified.	Wait for the Approver or follow Additional Review instructions.	Do not resolve unless instructed.
RED	A significant privacy concern has been identified.	Stop and wait for Additional Review instructions.	Do not resolve unless instructed.
NO FLAG	No C-PIA flag was generated.	Normally no further district review is needed unless catalogue/other workflow applies.	Do not assume all future changes are automatically covered.

GREEN / YELLOW — What you should do

1. Read the flag description.
2. Review the relevant Terms of Use and Privacy Policy language.
3. Decide whether the issue can be addressed through an acceptable resolution.
4. If appropriate, add a Condition of Approval, comment, attachment, or written vendor clarification.
5. Update the Recommendation status as directed by your district process.
6. Submit the review.

Common resolution approaches

- Accept the identified risk when permitted by your district process.
- Add conditions that limit or control use.
- Contact the vendor for clarification in writing.
- Attach the vendor's written response or revised terms to the item record.

EXAMPLE — YELLOW FLAG

The Privacy Policy does not clearly explain data security. Action: review the available documentation, seek clarification if needed, document the response, and add any required condition of approval.

6. RED / ORANGE — Stop and Wait for Instructions

DO NOT AUTOMATICALLY RESOLVE A RED OR ORANGE FLAG

The C-PIA process initially instructs Reviewers not to resolve Red or Orange flags unless an Approver initiates Additional Review.

Examples of issues that may require additional review

- Sensitive Personal Information (SPI)
- Sale of personal information to third parties
- Home/personal-use-only restriction
- Required integration with another system
- Inappropriate commercialization
- More personal information collected than necessary
- Data importation from another district system
- Primary gradebook or communication use requiring district-specific consideration

If you receive an Additional Review request

1. Read the Approver's instructions carefully.
2. Complete only the additional review work requested.
3. Add resolution comments and supporting documentation.
4. Update Recommendation status and Conditions of Approval as needed.
5. Click Submit in the Additional Review email.

RED FLAG EXAMPLE — SENSITIVE PERSONAL INFORMATION

The C-PIA User Guide identifies examples such as Personal Education Number (PEN), Social Insurance Number (SIN), health and behaviour information, financial information, IEPs, and developmental progress tracking. A Red flag of this type may require further internal and/or external assessment.

If you are not sure

Stop the process and contact the district C-PIA contact. Do not guess at a privacy decision.

7. Additional Review: What Happens Next?

Additional Review is initiated by an Approver when further review or resolution is needed. The Approver may assign additional people with specific expertise.

Approver — simplified steps

1. Open the C-PIA Approval Request email.
2. Review the flags and information.
3. Decide whether further review is needed.
4. Add additional Reviewers if required.
5. Add clear instructions in the Comments field(s).
6. Click Reassign to start Additional Review.

Additional Reviewer — simplified steps

1. Read the Additional Review Request email.
2. Follow the specific instructions from the Approver.
3. Complete the assigned review.
4. Add resolution comments/documentation.
5. Update Recommendation status and Conditions of Approval as needed.
6. Click Submit.

GOOD PRACTICE

An Additional Review request should tell the Reviewer exactly what needs to be checked—for example, security, data integration, privacy language, or another specific concern.

8. Approval: Choose the Correct Outcome

This section is primarily for Approvers. The Approver reviews the flags, comments, documentation, and recommendation before choosing an outcome.

Outcome	Meaning	Next step
Approved	The resource can be used.	The resource proceeds to Finalization.
Special permission needed	The resource can be used with the district's special-permission approach.	Proceed according to district process and Finalization.
Not Approved	Use is not suggested.	The resource proceeds to Finalization.
Do not proceed	District-defined outcome for cases where a final approval decision is not appropriate.	Follow district instructions.
On Hold	A final decision is not yet appropriate.	Communicate with the Submitter and/or restart/reassign as appropriate.
N/A	Typically associated with No Flags until catalogue publication is requested.	Follow the catalogue workflow if applicable.

RED / ORANGE DEFAULT

The C-PIA User Guide states that Red and Orange flags default to Not Approved, but this can be changed through the Additional Review process.

What the Approver should check

- Are the flags understood?
- Are comments and supporting documents sufficient?
- Were required conditions documented?
- Is additional review needed?
- Is the recommendation appropriate for the intended use?

9. Finalization: Last Check Before Publication

Finalizers perform the final checks after the approval stage.

Finalizer checklist

- Open the C-PIA Review Finalization Needed email.
- Click the Item Link.
- Double-check Recommendation status.
- Check or update the Expiry Date.
- For resources being published: verify description and Terms of Use link.
- Prepare and attach a consent form when required.
- Use the Publish Review toggle when the resource should appear in the Published Catalogue.
- Add/update the resource image or logo if required.
- Click Submit.

THREE-YEAR EXPIRY

The C-PIA User Guide states that reviews have a default three-year expiry. The Expired Reviews view is used to prompt re-examination.

Published Catalogue

Only resources with a Recommendation status of Approved should be made visible in the Published Catalogue.

Published resource cards can include the resource name, Terms of Use link, description, cost, conditions, additional conditions, and consent form link.

10. Common Situations & Quick Answers

If this happens...	Try this...
I am not sure whether the tool uses personal information.	Use the Request for Assistance process / contact the district C-PIA staff. Do not guess.
I cannot install the app to review it.	Use Request for Assistance. The User Guide states that the submission is not recorded in this situation.
My review timed out.	The flow can be restarted from the Classroom PIA Form or Dashboard using Restart Flow.
A staff member changed roles.	The flow may need to be restarted so the new individual(s) can be assigned.
I see No Flags.	No further review/approval is normally needed unless the resource is being moved to the Published Catalogue or another district process applies.
I see Red or Orange.	Do not resolve unless an Approver sends the item for Additional Review.
I need to see the original submission.	Open the resource record and look under Attachments for the HTML original record.
I need to see changes made later.	Use Version History from the item menu.

Restart Flow — quick steps

1. Locate the resource in Classroom PIA Form or Dashboard.
2. Choose Edit in grid view.
3. Set Restart Flow to Yes.
4. Exit grid view.
5. Click Save.
6. The review process should restart at the beginning within a few minutes.

11. One-Page Quick Reference

C-PIA IN 7 STEPS

1. Open the email → 2. Click Item Link → 3. Check the resource information → 4. Identify the flag → 5. Review the required documentation → 6. Add comments/conditions if needed → 7. Submit

Remember the flag rule

Flag	What it means	What you do	Do NOT do
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NO FLAG	No C-PIA flag was generated.	Normally no further district review is needed unless catalogue/other workflow applies.	Do not assume all future changes are automatically covered.

Before you click Submit

- I reviewed the information relevant to my task.
- I checked the Terms of Use and Privacy Policy when required.
- I followed the instructions for the flag.
- I added comments/documentation where needed.
- I did not attempt to resolve Red/Orange unless instructed.
- I updated the required status/conditions.
- I am ready to submit.

Useful official links

C-PIA Managed Solution: <https://focusedresources.ca/privacy-technology/classroom-pia-model>

C-PIA Training & Change Management: <https://focusedresources.ca/privacy-technology/resources/classroom-pia-training-and-change-management>

Focused Education Resource Centre: <https://focusedresources.ca/privacy-technology/resources>

Selecting Learning Resources Support: <https://focusedresources.ca/selecting-learning-resources-support>

District-specific contacts

C-PIA District Contact: _____

Privacy Contact: _____

IT / Technical Support: _____

District C-PIA Site / Dashboard: _____

District Analysis Checklist: _____

Appendix A — Role Cheat Sheet

Role	Main responsibility	Typical action
Assigner	Assigns Reviewers to a specific review.	Assign a reviewer and submit the assignment request.
Reviewer	Examines flagged aspects and makes recommendations.	Review → resolve when instructed → document → Submit.
Approver	Determines the outcome.	Approve / Not Approve / Reassign / other district-defined outcome.
Finalizer	Performs final checks and prepares publication.	Check status/expiry → publication details → Submit.

Appendix B — Source & Scope

This simplified manual is based primarily on the uploaded Classroom PIA User Guide, Version 3.0, October 2025. It is intentionally shorter and task-oriented. It does not replace the full User Guide for system administration, district configuration, role assignment, reporting, maintenance, or unusual workflow situations.

Official Focused Education Resources pages were included as clickable references so users can access current C-PIA implementation, training, and resource-selection materials.