

Disclosing Personal Information Standard

1. To the individual/in person

You may provide individuals with a copy of their own personal information¹ upon confirmation of their identity. Individuals can prove their identity by producing government issued photo identification or the University of Calgary ID card. Ensure that the individual signs, acknowledging receipt of the document, whether it is the original or a copy.

2. To the individual/by mail

You may send the personal information of an individual to the individual it is about by regular mail. Documents are mailed to the address in the enterprise reporting system (PeopleSoft).

Document the disclosure in the system if possible.

3. To the individual/by fax

When there are no other viable options (e.g. regular mail), you may fax a document containing the personal information of an individual to the individual the information is about UNLESS the information includes the individual's SIN.

Always use a fax cover sheet. The cover sheet should clearly identify the sender (with call-back particulars for the sender) and the intended recipient and should specify the number of pages being sent. Phone the individual before faxing the document to confirm that the individual is available to receive the fax and to confirm the fax number. Ask the individual to call to confirm receipt of the fax.

Document the disclosure.

4. To the individual/by email

You may send personal information to the individual the information is about by email only when:

- a) the individual:
 - i. has identified the information and requested that it be sent by email and
 - ii. has a University of Calgary assigned email address; or
- b) the information is:
 - i. password protected and
 - ii. attached to the individual's University of Calgary assigned email address.

The password can be sent in a separate email message or provided to the individual over the phone.

Document the request for information and the disclosure.

¹Personal information means information about an identifiable individual and includes a confirmation of employment letter, Record of Employment, T4/T4As, UCID, scholarship information, etc.

5. To the individual/over the phone

You may provide personal information to the individual the information is about when you can verify that the individual you are talking to is who he or she claims to be.

Verify the identity of the caller by matching information in the University's system with responses to at least one security question in each of the following areas.

First question:

- UCID number*

Second question:

- full name
- current address
- primary phone number
- faculty/department of employment or registration

Third question (as appropriate or relevant):

- date of birth
- approximate dates of employment
- approximate value of T4/T4A or annual income
- approximate dates of enrolment
- past course history
- current course enrolment
- eID password recovery questions
- SIN

*If unknown, the caller will need to provide at least three pieces of discrete information listed under the third question.

If the caller is requesting information that is classified as highly confidential (e.g. SIN, health information) or that you would consider to be very sensitive, do not respond unless you have an answer to the first question, at least two answers to the second question, and three answers to the third question.

If the caller gets two questions or two types of questions wrong, refuse to provide the information over the phone and terminate the call.

If you do not have access to sufficient information to satisfactorily verify the identity of the caller, refer the caller to someone who has broader system access.

Document the call and/or the disclosure.

6. To a third party with consent/in person

You may provide a copy of a document which contains personal information to an individual other than the individual the information is about (a third party) if you have the written consent of the individual the information is about (the requestor).

The following forms of written consent are acceptable:

- an email message from the requestor to you or to a group account that you have access to; or
- an original signed letter from the requestor.

The email message or letter must include:

- the requestor's name;
- the requestor's UCID number;
- the name of the third party; and
- the document or information to be picked up.

Check the third party's photo identification to verify his or her identity and have the third party signs an acknowledgement of receipt.