

In your capacity as a UC Merced employee (faculty, staff, or student), agent, or vendor, you may be responsible for handling sensitive and confidential data pertaining to individuals and organizations that interact with the University. This information (for example, name, address, telephone number, employer, email address, giving history, wealth information, education, etc.) is maintained in the External Relations constituent database. The Raiser's Edge and auxiliary systems, including but not limited to the Anthology Encompass platform, ResearchPoint, LiveAlumni, RelSci and various profiles and summaries as compiled by the Prospect Research Unit.

All University employees (including part-time, temporary, contractual, and student assistants), authorized agents (i.e consultants and volunteers), and vendors are required to safeguard and always ensure privacy of all sensitive and confidential data, including any communications channels, (i.e., face-to-face, mail, email, marketing communications, social media, and telephone outreach).

Information Release

External Relations data and information may NOT be released unless with prior written authorization of the External Relations Data Steward (or their designate), in which case information in the form of lists, labels, reports, and any other media may be made available ONLY to University personnel, campus partners, or authorized vendors with a direct University liaison in support of official, approved University business. All parties that handle University information will be held accountable for the safety of the data. It is the responsibility of the requestor to ensure the confidentiality of that information. Any questions regarding access to data should be directed to the appropriate External Relations Data Steward (or their designate).

Records Disposal

External Relations information must be destroyed when no longer needed for the purpose for which it was provided. This information must be destroyed in such a manner that it cannot practically be read or reconstructed. Certified document destruction services must be used for printed media.

Statement of Responsibilities as a System User

Upon reading and signing the Confidentiality Policy, I will receive or renew my External Relations data and I agree to abide by and respect the agreement outlined above. I will also abide by all departmental policies and practices of UC Merced and UC policies and practices, as well as federal and state laws concerning security, privacy, and correct use of all University and External Relations systems and other database resources.

I agree (1) to use External Relations data and resources ONLY when authorized, and for only bona fide University business that I am explicitly authorized to conduct; (2) to never share my personal logon information with anyone; (3) to not provide anyone else with access to or use of any External Relations data, including the contents and data stored within; and (4) to promptly report any suspected data security violations and incidents should be reported to the Director of Data Services and will be handled in accordance with the practices and policies outlined in [BFB-IS-3: Electronic Information Security Policy](#).

I also acknowledge and agree to abide by the communication and contact preferences of the individuals or organizations I am attempting to contact or interact with. If I receive updated information of any kind (e.g., contact updates, communication preferences, etc.), I understand that I am required to report these updates to the External Relations, as soon as possible, to respect and honor the wishes of UC Merced constituents.

I acknowledge that failure to comply with UC Merced policies and state and federal laws that govern disclosure of information and use of computer systems or failure to respect the confidential nature of any or all information used or acquired by the University may result in disciplinary action being taken against me, including release from employment and/or other actions to the full extent of the law.

Signature	Date
Print Name	
Title	
Department	Department Ext.
Supervisor	

****This section must be completed for all data or access requests by non-Alumni Relations staff****

External Relations Liaison Approval

External Relations Liaison

Ext.

External Relations Department

External Relations Liaison Signature

External Relations Data Steward Approval

Date

Relevant Policies and Laws

- [University of California Merced - Policy for Acceptable Use](#)
- [University of California Office of the President – Electronic Communications Policy](#)
- [California State Assembly Bill \(AB\) 1950 \(2004\)](#)
- [Federal Educational Rights and Privacy Act \(FERPA\)](#)
- [BFB-IS-3: Electronic Information Security](#)