

EMPLOYEE RECORDS / FILES AND DISCLOSURE OF INFORMATION

Background

The District is responsible for establishing, maintaining and protecting employee records/ files/information to meet all operational, legal, tax and audit requirements and for physically destroying records no longer needed for any business reason.

Procedures

1. All employee information is privileged and confidential. The right of every individual to privacy (as defined under the *Access to Information Act* and the *Protection of Privacy Act*) will be recognized and protected. Employee information shall not be made available to parties external to the District, except as authorized in writing by the employee or as required or allowed by law.
2. The Superintendent of People Services or designate will be responsible for maintenance and access to employee personnel information. This includes data from the People Services Peoplesoft System, PC Docs Imaging System, and employee benefit documentation.
 - 2.1 Principal/supervisor access to People Services personnel files:
 - 2.1.1 The entire People Services file of an employee cannot be shared with principals/supervisors. Only relevant documents necessary to assist principals/supervisors in the performance of their duties, or in making an informed decision involving the management and administration of personnel may be disclosed.
 - 2.1.2 The following are sample documents that may be disclosed to principals/supervisors, on a 'needs to know' basis, for the hiring of staff or monitoring of performance:
 - 2.1.2.1 Performance evaluations;
 - 2.1.2.2 Disciplinary letters;
 - 2.1.2.3 Letters and documents regarding attendance;
 - 2.1.2.4 Documents related to education/training/upgrading.
 - 2.1.3 Approval for accessing V personnel files is determined by the Superintendent of People Services.
 - 2.2 Principal/supervisor sharing of private personnel files:
 - 2.2.1 The same information [above clauses 2.1.2.1 to 2.1.2.4] from the private files of principal/supervisors may be shared when an employee is being reassigned or is applying for a different position, on the condition that such information has

been shared with, or made known to the employee. Prior to sharing private file information, the Superintendent of People Services must review and approve the specific information to be shared.

2.2.2 The release of any and all information from both the People Services personnel file and principal/supervisor personnel file must be carefully scrutinized. There must be a compelling rationale for disclosure that is directly related to the hiring, management and administration of the employee.

3. File transition:

3.1 Where an employee is transferred to another District school, or for any other reason, no longer remains an employee of the District, private personnel files of principals/supervisors relating to that employee shall be forwarded to the Superintendent of People Services.

4. Access to employee information shall comply with the *Access to Information Act* and the *Protection of Privacy Act*.

Approval Date: March 17, 2020

Reference: *Education Act*, SA 2012, c E-0.3
Access to Information Act, SA 2024, c A-1.4
Protection of Privacy Act, SA 2024, c P-28.5
Calgary Catholic School District: Collective Agreements
CUPE, Local 520
Unifor, Local Union No. 1990
The Alberta Teachers' Association, Local 55
Calgary Catholic School District: Exempt Employee Handbook