



Policy 3.2 Third Party Requests for Constituent Information

Responsible Official: VP for Development & University Relations
Administering Division/Department: ACE (Donor Records System)
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Overview

To ensure that requests to update or provide information in the development database ("ACE") on constituents are from an approved third party.

Applicability

Any third party, external to the faculty and staff of Emory University, who requests to update or provide constituent information in the development database (ACE).

Policy Details

The Office of Development and Alumni Relations takes every measure to protect and secure constituent information in its files and in ACE in accordance with the policies of Emory University and other governing sources.

These procedures should be followed when updating information from third parties, or when requests are received from third parties to obtain information on constituents of Emory University.

- Requests for updating information in ACE may be taken over the telephone if you are able to identify the caller; but in the course of doing so, you may not release to the caller information contained in the system.
- If you are not familiar with the caller, verify degree, parent name and past address information stored in ACE. If you are unable to verify this information, and are not familiar with the caller, a better alternative for updating information is to direct the caller to the Alumni Website (<http://www.alumniconnections.com/emory>) so he or she can securely update the information.
- Non-alumni also can update their information online at <http://www.alumni.emory.edu/bio/addressform.cfm>
- If the web is not an option for the requestor, ask him/her to update the information in writing to the Office of Alumni and Development Records. They make sure the information is verified and updated accordingly.

Definitions

ACE: Constituent records database, Advancement Community at Emory.

Related Links

- Current Version of This Policy: <http://policies.emory.edu/3.2>
- [DAR ACE Website](http://www.ace.emory.edu/policy.htm) (http://www.ace.emory.edu/policy.htm)

Contact Information

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Revision History

No previous versions of this policy were found.