

## PERSONAL INFORMATION CHANGE REQUESTS

The University of Calgary follows fair and consistent processes when handling employee requests to change personal information. This directive outlines the process University of Calgary employees must follow to change personal information, including legal name change, divorce, marriage, gender reassignment or correction to other personal information.

### Managing personal information - employee

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#### **Step 1: Change employee name and / or contact information in My UCalgary / PeopleSoft**

You can update your personal information in the My UCalgary portal (log into the My UCalgary portal >> All about me >> My info). Step-by-step instructions for updating an employee name, phone number, address, email address or emergency contact information is available at <https://www.ucalgary.ca/hr/training-development/how-learning-resources/university-essentials#peoplesoft-essentials> under Personal Information.

#### **Step 2: change a user's username/email address (IT Support)**

Once all changes have been made in PeopleSoft (it can take up to 24 hours to process), the employee will need to confirm the change to the username and email address directly to [IT Help Desk](#) at 403-220-5555 or by logging a ticket to [itsupport@ucalgary.ca](mailto:itsupport@ucalgary.ca).

### Managing benefit information – employee and dependents

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Most information changes may be made by the employee through the self-service function of the My UCalgary portal. Visit the [Life Events](#) section of the HR website for full details. To add / remove or amend personal information for an employee or dependent under group benefit plan coverage, please follow the standard processes in place through My UCalgary / BenAdmin Self Service. Instruction manuals are available on the HR website under your Staff Group.

Where changes cannot be updated through the portal, employees must submit a Benefit Change Form available from [benefits@ucalgary.ca](mailto:benefits@ucalgary.ca). These changes include:

#### *Family status Change (add / remove dependent > 31 days)*

A Benefit Change Form must be completed to update family status which have taken place more than 31 days in the past to update the employee and group benefit records. Supporting documentation will be required to accompany all requests to remove coverage in cases of divorce or to add coverage following loss of group coverage under a spouses plan.

#### *Change Gender Expression / Identification (Employee)*

The My UCalgary portal self service does not have the capacity at this time to allow an employee to record a change to their gender. To change their gender in the employee's HR and benefit records, a Benefit Change Form must be completed. The University is not required to obtain proof of gender reassignment surgery or other supporting documentation to change an individual's gender or name in the employee records.

**Note:** An employee can update the gender of their dependents in the My UCalgary portal under the module "Dependent / Beneficiary Update" [Navigation: Life Events >> Select your Event > Choose an Event: Dependent / Beneficiary Update](#)

### Documentation Requirements

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In cases where documentation is necessary, it will only be used for the purpose of confirming family status for benefit eligibility, coverage dates or to calculate premiums. *For example, where optional insurance coverage is available to our employees and their dependents, the premiums are generally based on gender, smoker / non-smoker status and age. Should a death or other benefit become payable, the insurance provider may request identification from the insured individual.*

Appropriate Identification may also be requested to validate the identity of an individual for payment of claims, or in some cases, evidence of insurability may be necessary to provide coverage under any of the optional or basic group plans in order to pay a benefit. The supporting documentation that will be required is dependent on the impact the change will have on the employee's group coverage. *For example, if an employee divorces their spouse, and the spouse is no longer covered under the benefit plan, a copy of the divorce decree will be required for the employee records in order to stop coverage under our plan.*

**Any time an employee is required to provide supporting information or documentation, there must be a specific reason for the collection, use or disclosure of the personal information by the University of Calgary.**

#### Examples of commonly requested changes and documentation requirements

**Preferred or First Name** – Supporting documentation is not required to process a request by an employee to change their preferred name to have it accurately reflect their gender identity.

**Surname** – Supporting documentation is not required if the change is requested through My UCalgary portal and BenAdmin.

**Gender** – Effective December 11, 2015, the Government of Alberta amended the Alberta Human Rights Act to add gender identity and gender expression as expressly prohibited grounds of discrimination.<sup>i</sup> In accordance with this regulation, the University is not required to obtain proof of gender reassignment surgery to change an individual's gender or name in the employee records.

**Dependent coverage** – adding a family member to group benefits will require proof depending on the circumstances. For new dependents, acceptable documentation includes birth, adoption or marriage certificate.

**Over-Age dependent coverage** – if your dependent is nearing age 21, you will receive a notification to update your dependent's status. Confirmation must be received to confirm the over-age disabled child or full time student is eligible for coverage under group benefit plan rules. Annually, you will receive a notification to update this information.

**Remove dependent coverage** – in the case of divorce or death, a legal document will be required to remove the spouse from the U of C employee's group benefits.

**Smoker / non-smoker** - The employee would need to sign a declaration form confirming non-smoking status for the past 12 months; no cigarettes, pipes or used tobacco in any form. The form would be retained in the employee file and the U of C will proceed to reduce the employee's Optional Life premiums effective one year as "non-smoker" date. In the event of a Life claim, this declaration would need to be submitted with the claim form as Manulife would have it currently underwritten on a smoking basis.

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[https://www.albertahumanrights.ab.ca/publications/bulletins\\_sheets\\_booklets/sheets/history\\_and\\_info/Pages/protected\\_areas\\_grounds.aspx](https://www.albertahumanrights.ab.ca/publications/bulletins_sheets_booklets/sheets/history_and_info/Pages/protected_areas_grounds.aspx)