

Advancement | UCF Foundation, Inc.

W-9 Distribution/Social Security Number Collection Notice Policy

Policy# 7.35

Effective Date: 12/15/2020

Responsible Department: Accounting

1. **PURPOSE**

University of Central Florida Foundation, Inc. (Foundation) employees may collect or have access to personal and privileged information, including social security numbers, related to the division and the Foundation activities. This requires a commitment of confidentiality to protect this sensitive information. Unauthorized disclosure or access of this information could create legal liability and loss of public confidence in the University of Central Florida (University) and the Foundation. Social Security numbers are confidential and may only be released under such circumstances as set forth by Florida Public Records Act or as required by law or court order.

2. **APPLICABILITY**

This policy applies to all University employees requesting payment from or administering Foundation funds.

3. **POLICY**

Foundation employees must follow all University policies related to data confidentiality and specifically Collection and Use of Social Security Numbers when obtaining social security information on W-9 form from independent contractors or individuals to process payments. Any University employee collecting social security information from individuals for payment processing with Foundation funds shall provide the vendor with the Notice of Collection and Use of Social Security Numbers disclosure to comply with the requirements of Florida Statutes 119.071(5), which requires in part that a written statement is issued to any individual from whom a social security number is collected.

4. **CLARIFICATION**

Requests for clarification of this policy should be sent to the Associate Vice President and Chief Financial Officer.

Certified as approved by the Executive Committee of the Foundation Board of Directors on December 15, 2020.

Name: Rachel Schaefer

Title: Associate Vice President for Advancement Strategy and Chief Operating Officer

Revision history: 2/16/2015
Adoption Date: 6/4/2008

History: 378