

Standard

Proactive and Routine Disclosure

This standard falls under *A1477 Data and Information Management Administrative Policy*.

Program Impacted	Civic Services <i>Edmontonians contribute to civic society and are engaged in promoting the quality of the community.</i> Technology & Data <i>The City of Edmonton's technology and data are leveraged to enable quality decision-making and enhance innovative service delivery.</i>
Approved By	Aileen Giesbrecht, City Clerk
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Standard Statement

This standard defines the requirements for releasing City information informally. It also explains when the formal access to information process must be used, as per the *Access to Information Act* (ATIA).

This standard falls under the Lifecycle Management functional domain, as defined in *A1477 Data and Information Management Administrative Policy*.

Scope

This standard provides direction for City of Edmonton employees, contractors, volunteers, Council Committees and any individuals for whom the City Clerk acts as the Access and Privacy Head. It applies to these parties whenever their work involves creating, collecting, receiving, accessing, using, disclosing, storing, maintaining, destroying or transferring City records and information.

Definitions

Access to Information (ATI) request means the process prescribed in the *Access to Information Act* that describes an individual's right to access any information in the custody or control of the City, including an individual's own information. Public bodies may not submit ATI requests to other public bodies.

Applicant means a person who makes a request for access to information under the *Access to Information Act (ATIA)* or a request for correction of personal information under the *Protection of Privacy Act (POPA)*.

Disclosure means the process of making information available.

Personal information means any recorded information about an identifiable individual, including but not limited to:

- a) the individual's name, home or business address, home or business telephone number, home or business email address, or other contact information, except where the individual has provided the information on behalf of the individual's employer or principal in the individual's capacity as an employee or agent,
- b) the individual's race, national or ethnic origin, colour or religious or political beliefs or associations,
- c) the individual's age, gender identity, sex, sexual orientation, marital status or family status,
- d) an identifying number, symbol or other particular assigned to the individual,
- e) the individual's fingerprints, other biometric information, blood type, genetic information or inheritable characteristics,
- f) information about the individual's health and health care history, including information about the individual's physical or mental health,
- g) information about the individual's educational, financial, employment or criminal history, including criminal records where a pardon has been given,
- h) anyone else's opinions about the individual, and
- i) the individual's personal views or opinions, except if they are about someone else.

Proactive disclosure means making information available to the public without a request, either online, in hard copy or by other means.

Public bodies are organizations who are subject to the *Access to Information Act* and the *Protection of Privacy Act* and are defined in the *Access to Information Act, Section 1* and *Protection of Privacy Act, Section 1*. For the purposes of access and privacy policy tools, public bodies may include:

- a. any government institution, including departments, agencies, boards, commissions or Crown Corporations of the Government of Canada or as defined in the Canada Access to Information Act, R.S.C., 1985, c.A-1,
- b. any department, branch, or office of the Government of Alberta or other province,
- c. the Legislative Assembly Office and any independent offices of the Legislature,
- d. any agency, board, commission, corporation, or other body designated as a public body within applicable regulations,
- e. any local public body, such school boards, post-secondary institutions, public health care institutions, municipal governments and the boards, committees, commissions, panels, agencies or corporations created or owned by them.

Record means any electronic record or other record in any form in which information is contained or stored, including information in any written, graphic, electronic, digital, photographic, audio or other medium, but does not include any software or other mechanism used to store or produce the record.

Routine disclosure means making information available to the public upon request via business area processes.

Standard Specification

The *Access to Information Act* (ATIA) outlines how the City must release information to the public, with the goal of making information more readily available to the public where appropriate. In compliance with ATIA requirements, City information that:

1. Should be readily available to the public must be *proactively disclosed*.
2. Can be made available from the business area upon request must be *routinely disclosed*.
3. Cannot be publicly available nor released through a business area's routine procedures must be requested via an *access to information (ATI) request*.

Compliance with ATIA is regulated by the Office of the Information and Privacy Commissioner (OIPC).

Disclosure methods must be selected based on the verified security classification of the information — see the *City of Edmonton Classification and Retention Schedule* for security classification descriptions and default security classifications for record series.

The goals and benefits of the different types of disclosure are summarized in Table 1.

Table 1: Summary of Disclosure Types

	Proactive Disclosure	Routine Disclosure	Formal Access to Information (ATI) Request
Primary Goal	Open access to public documents	Access to certain types of records without a formal legislated request process	Access to records that are not publicly or routinely available
Benefits	Self-serve access for the public, reduced administrative burden on the Corporate Access and Privacy (CAP) team and business area staff	Faster response to the resident, reduced administrative burden and support of the City's <i>open by default</i> principle	Subject matter expertise for complicated disclosures
When to use it	When information is appropriate to share with the public, especially if there's expected or demonstrated high public interest in a specific topic, or when information has been legislated to be publicly available	When responding to resident inquiries during the course of your work where the requested information: <ul style="list-style-type: none"> • does not require complex redaction processes; and • Is permitted under POPA 	When the information is complex and may contain personal or third-party information or information that could harm the City or public if disclosed
Processed by	The business area, in consultation with leadership or other areas, if appropriate	The business area, in consultation with leadership or other areas, if appropriate	Corporate Access and Privacy (CAP) within the Office of the City Clerk, in consultation with the business area and affected external bodies
ATIA Citation	None, but a rationale for disclosing or withholding information must be documented and defensible	None, but a rationale for disclosing or withholding information must be documented and defensible	Full citation
Right of Review	Applicants cannot request a formal OIPC review	Generally, applicants cannot request a formal OIPC review	Applicants and third parties have a right to request an OIPC review

Proactive Disclosure

Proactive disclosure involves releasing information or records without waiting for a request. Proactive disclosure is most effective when the City expects high public interest in a specific topic. However, as a best practice, business areas should proactively disclose all information that *can be made* publicly available. Public information is shared with the public through the City's external websites and other mediums.

Proactive disclosure must be used only for records with *public* or *internal* security classifications. Generally, any record which could be excluded from an ATI request under ATIA or POPA should not be subject to Public or Routine disclosure. Such exclusions include, but are not limited to, records that:

- include personal information for individuals who have not consented to disclosure;
- are provided to the City in confidence or are otherwise confidential, such as internal evaluations;
- contain advice to City officials, including but not limited to legal advice;
- may be harmful to law enforcement investigations, to species classified as endangered or vulnerable, to an individual or to the public's safety.

The head of the public body has the authority to specify categories of records that will be made available to the public without a formal ATI request under the Act. Please contact Corporate Access and Privacy (CAP) within the Office of the City Clerk if it is unclear whether a record is subject to ATIA or POPA restrictions for disclosure.

Routine Disclosure

Routine disclosure is for information that is not publicly available or cannot be made publicly available because the information may contain some sensitive elements, such as, but not limited to, information with exclusive rights or with a minor amount of sensitive information which will require a simple verification or redaction process (e.g., blueprints belong to the property owner and can be provided to the requestor upon ownership verification). This disclosure type allows records to be released upon request or inquiry, avoiding the necessity of a formal request under ATIA. By default, the business area that has custody or control of the information should undertake routine disclosure of that information. If a routine disclosure request requires responses from multiple business areas, CAP will coordinate.

Routine disclosure must be used only for records with *public* or *internal* security classifications. The head of the public body has the authority to specify categories of records that will be made available to the public without a formal ATI request under the Act.

Routine Disclosure Procedures

Routine disclosures follow business area operational procedures, which must include:

- ***Privacy check:*** Business areas must not disclose personal information that would be an "unreasonable invasion of a third party's privacy" to the public.
 - For example, sharing business or office contact information is typically not considered an unreasonable invasion of privacy; however, disclosing details about a person's home life can be.
- ***Security check:*** Business areas must compare the record(s) to be disclosed to the relevant record series' default information security classification, listed in the *City of Edmonton Classification and Retention Schedule (CRS)*. The default security classification is determined by the most restrictive record type in that

series. Individual records may have less restrictive classifications than the record series default; therefore, records to be disclosed must be individually compared to the security classification criteria in the CRS to determine if a less restrictive access is permissible.

- *Business check*: Business areas must not disclose information that could harm third-party business interests or impact the City's future economic decisions. Other considerations may also be identified.
- *Documented rationale*: Rationale for withholding or disclosing information must be documented and defensible.

Redaction

Routine disclosures may involve minor redactions of personal information. For guidance on or assistance with redacting personal information, please contact CAP.

Routine Disclosure to Another Public Body

When disclosing information to another public body, business areas must identify and document the specific section of POPA that authorizes disclosure and only disclose personal information to the extent necessary for the authorized purposes. For the requirements for routine disclosure to other public bodies, please see the *Release of Personal Information to Other Public Bodies Administrative Standard*.

Disclosure of Manuals, Handbooks and Guidelines

Under ATIA, the City is required to make any manual, handbook or guideline used by employees for decision-making available to the public without a formal access request. These records must be made proactively or routinely available and must be managed directly by the business area.

If there are concerns regarding the disclosure of specific information within these materials, content may be withheld under an applicable ATIA section. CAP is available for consultation to determine what information should be withheld and to assist with applying the necessary redactions.

Partial Routine Disclosure

If a request cannot be satisfied entirely through routine disclosure, the City may address it using a combination of routine disclosure and the formal ATI request process. When this is the case, the City will advise individuals of both processes.

Formal ATI Request for Information

A formal ATI request must be submitted only if the information is not publicly available and the inquiry cannot be addressed through a business area's routine procedures. A formal ATI request is required if responding to the applicant involves releasing:

- a significant amount of personal or external organizational information;

- information that could harm an individual, the public or the City if released; or
- records where disclosure is not authorized under a specific legislative authority.

CAP manages formal access requests in consultation with the business area to ensure that only appropriate information is released.

Formal ATI requests must be used for records with *confidential* or *restricted* security classifications.

Exceptions

The City cannot instruct other public bodies to submit ATI requests, as this path is not available to public bodies. Under section 8 of ATIA, a public body cannot make a formal ATI request to another public body to gain access to a record in the public body's custody or control. Business areas should contact CAP for guidance if they receive a request from another public body and are unsure which POPA section authorizes disclosure to that public body.

OIPC Information Access Review

Applicants who are dissatisfied with the City's response to their ATI request, or who believe the City did not provide all existing responsive records, may submit a request for the OIPC to review the matter.

Review Phase

Upon receiving the applicant's request, the OIPC assigns a Senior Information and Privacy Manager (SIPM) to complete a review of the matter. CAP is responsible for coordinating with and responding to the OIPC during this stage. To ensure a comprehensive response, CAP collaborates with the relevant business areas and all relevant stakeholders. The OIPC may fully agree, partially agree or fully disagree with the City's response. Based on the OIPC's findings, CAP, in consultation with the business area, must determine whether to modify the City's response to the applicant's ATI request.

Inquiry Phase

If a matter remains unresolved following the review, the Commissioner will decide whether it proceeds to an inquiry or is considered closed. If an inquiry is initiated, the OIPC Adjudicator unit will notify the applicant and the City, to which the City must submit a response package. At this stage, CAP transitions the file to the assigned City lawyer and continues to provide support. The inquiry concludes when the Commissioner or Adjudicator issues a decision in the form of a binding order based on the evidence submitted by the applicant and the City's lawyer. If the order imposes any actions on the City, the City's lawyer, CAP and the relevant business area must comply within 50 days of receiving the order.

Compliance

Branch managers are accountable for ensuring that access and disclosure practices within their branches comply with ATIA and City of Edmonton policies. Business areas have both the duty to assist members of the public in accessing records appropriately under ATIA and the responsibility to assist the Corporate Access and Privacy team in the Office of the City Clerk when contacted. Business areas are responsible for completing and maintaining records access tasks, including but not limited to:

- Searching for records responsive to an ATI request in a thorough and timely manner;
- Documenting the search details in the search log;
- Responding to consultations to advise if there are concerns with the release of business area records;
- Creating and maintaining accurate records of routine disclosure decisions and actions; and
- Developing and implementing routine disclosure procedures compliant with ATIA and this Standard.

Failure to comply with this standard could result in the loss of personal information, damage to the City of Edmonton's reputation, costs and fines, legal risk, information breaches and complaints from the public.

References and Supporting Resources

Legislation

- [Access to Information Act, SA 2024, c A-1.4](#)
- [Access to Information Act Regulation, Alta Reg 133/2025](#)
- [Protection of Privacy Act, SA 2024, c P-28.5](#)
- [City Administration Bylaw, Bylaw 16620](#)
- [A1477 Data and Information Management Administrative Policy](#)
- [C581 Open City Policy](#)

Supporting Resources

- [City of Edmonton Delegation of Authority Order](#)
- [Corporate Information Management Glossary of Terms](#)
- [Corporate Records and Information Management Accountability Model \(RASCI\)](#)
- Fact Sheet: [Records Available Without a Request for Access Under the ATIA](#)
- [City of Edmonton Classification and Retention Schedule](#)
- [Release of Personal Information to Other Public Bodies Administrative Standard](#)