

# Investment Data Standards Organization Best Practices

## **IDSO BEST PRACTICES** **Personally Identifiable Information (PII)**

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### **APPENDIX 1: EXAMPLE PII QUESTIONNAIRE**

Project Name: _____ Project Description: _____ Purpose: _____
Contact Name: _____ Title: _____ Organization: _____ Email: _____ Phone: _____
What data is to be collected? _____ _____ Describe data to be collected: _____ _____ What specific legal authorities, arrangements or agreements were defined during the collection of data? _____ What are the sources of the data? _____ _____ Why is the data being collected? _____ _____ Will the data be shared internally, externally or both? _____
Does the project use PII that can be used to directly identify an individual? <input type="checkbox"/> Yes. Please fill out the remaining questions. <input type="checkbox"/> No. Please skip the remaining questions. Field: _____ Description: _____ Purpose: _____ Field: _____ Description: _____ Purpose: _____ Field: _____ Description: _____ Purpose: _____ Field: _____ Description: _____ Purpose: _____ Field: _____ Description: _____ Purpose: _____ Field: _____ Description: _____ Purpose: _____ Please list additional items separately and attach as an appendix.
Signature: _____ Date: _____ Company Management or Designee: _____  Signature: _____ Date: _____ System Owner: _____ Title: _____ Company: _____ Phone: _____

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