

agencies, agents or contractors adequately protect the confidentiality of citizens' Federal Tax Information (FTI). FTI consists of federal tax returns and information derived from it; it may include Personally Identifiable Information (PII) (e.g., social security numbers, bank account numbers, date and place of birth, name of a person with respect to whom a return is filed, taxpayer mailing address, taxpayer identification number, etc.) For employees who have access to FTI, and who are approved to work on alternate worksite or home office location (e.g., teleworking, hoteling), the IRS Publication 1075 imposes an inspection requirement to safeguard against improper FTI mishandling, including but not limited to secure equipment, proper documents handling and storage, FTI transit, security-access control devices and County-approved software.

The proposed amendments to the policy includes communicating the requirement of site visit inspections of an employee's alternate worksite for those who have access to FTI; outlining County expectations from employees to safeguard FTI and other PII; identifying security best practices; and establishing the alternate worksite inspection checklist.

ALTERNATIVES:

The Board of Supervisors could choose to not to approve the proposed policy; however, staff does not recommend this alternative as the amendments to the policy reflect State and federal requirements outlined in the adopted Internal Revenue Service Publication 1075.

OTHER AGENCY INVOLVEMENT:

Notification of, and an opportunity, to meet on the proposed changes to the policy was provided to all bargaining unit representatives. One bargaining group requested to meet, but mainly for further clarification and request for further review of verbiage to comply with departmental practices and the Department of Information Technology policies. There were no substantive changes made to the policy, after the completion of the meet-and-confer process.

CAO RECOMMENDATION:

APPROVE DEPARTMENTAL RECOMMENDATION