

# RICHARD H. JEFFREY

## ERIE COUNTY AUDITOR

### AUDITOR'S OFFICE PERSONAL INFORMATION USE AND DISTRIBUTION POLICY

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Accounts Payable 627-7745  
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Administrative 627-6650

Estate Tax &  
General 627-7746

Real Estate:

Appraisal 627-7787  
Assessment 627-7658  
CAMA 627-7610  
CAUV 627-7743  
Homestead 627-7742  
Personal Property 627-7742  
Mobile Homes 627-7746  
Transfers 627-7853  
General 627-7746

Payroll 627-7747

Vendor's License 627-7746

Weights &  
Measures 627-6650



Secretary, Erie County Board of Revision  
Secretary, Erie County Budget Commission  
Member, Erie County Records Commission  
Scaler, Weights & Measures

The Erie County Auditor's Office is dedicated to ensuring the privacy and security of confidential personal information stored within the control of our office. As noted in the Ohio Revised Code, Chapter 1347, personal Information is defined as "any information that describes anything about a person or that indicates actions done by or to a person, or that indicates that a person possesses certain personal characteristics and that contains, and can be retrieved from a records system by a name, identifying number, symbol, or other identifier assigned to a person". Examples of identifying numbers may include a social security number, tax ID number, driver's license number, state identification card number, bank account number, and credit or debit card number.

The Auditor's Office collects, maintains and uses personal information only if it is necessary and relevant to the functions of the office or duties we are authorized to perform by statute, ordinance, code or rule. Personal information is eliminated when it is no longer necessary or relevant to those functions. Evaluation of personal information kept under the control of the Auditor's Office will be conducted on a yearly basis by the Fiscal Officer or Office Manager as acting data privacy point of contact personnel for the Auditor's Office.

Computerized personal information is maintained in the Auditor's Financial Systems Manatron or Harris software as well as downloaded reports in the T: or W: drive. All computerized personal information is by user defined access. Users must login with a password. The Office Manager will establish access privileges for the Accounts Payable and Payroll staff based on job duties and responsibilities. The Real Estate Manager will establish access privileges for the Real Estate staff based on job duties and responsibilities. Logins for each employee are created in the software systems security fields by the IT department or the GIS coordinator based on the recommendations of the managers. Any future or upgraded computer systems will be required to track access to confidential personal information. For current systems that do not allow this tracking process, users should manually log when they are looking at confidential personal information with the following exceptions: 1) where access both results from research, routine office procedures or incidental contact and is not directed at a specifically named individual whether individually or as part of a group. 2) where access results from a request by the individual for information.

Manual personal information is maintained in secured areas by those employees responsible for such information as designated by management. Accounts Payable is responsible for personal information regarding vendor 1099's and W-9 applications, vendor account numbers, county credit card account numbers, county bank account numbers and EFT routing numbers. Real Estate clerks maintain personal information on personal property, vendor license, junkyard license and cigarette license applications. Payroll clerks are responsible for any payroll related items such as departmental timecards, copies of social security cards, copies of driver's license and state identification cards, W-4, W-2 or bank routing forms which may have personal information such as bank account numbers or social security numbers.

The use of personal information is for the specific duties of each job classification only. Per ORC 1347.15, employee access that occurs as a result of research performed for official agency purposes, routine office procedures, or incidental contact with the information is justified, unless the conduct resulting in the access is specifically directed toward a specifically named individual or a group of specifically named individuals or the access is to confidential personal information about an individual. Access that occurs as a result of a request by that individual for confidential personal information about that individual is also acceptable. Any other use of this personal information is prohibited.

The distribution of any personal information is prohibited without the consent of the employee or vendor whose information is the subject of the request. Per ORC 1347.08, rights to personal information are granted by the subject of that information or their legal guardian or attorney with a written signed authorization. The Consent for Release of Personal Information form is available for the person to fill out. All requests for personal information must be in writing from the requestor and brought to the attention of the Office Manager or Fiscal Officer. In order to respond to the request, they will evaluate the consent and authorized signature of the person who is subject to the information request and will notify staff that it is appropriate to release the information. All written authorizations for releases of personal information should be given to the Fiscal Officer to be logged in a spreadsheet for compliance tracking.

Based on ORC 1347.09, a person may dispute the accuracy, relevance, timeliness or completeness of the personal information our office has on file. All disputes should be in writing and signed by the disputant. Our office will investigate this dispute and within ninety days, shall notify the disputant of the results of the investigation and the action that will be taken. If any there is any information that is verified as inaccurate, it will be deleted and corrected. If, after this determination, the disputant is not satisfied, our office will maintain a statement on file with a clear summary of the dispute that should be less than one hundred words. We will note such within the personal information system the dispute is relative to. This statement will be released with any future requests for this personal information.

Any employee that uses or distributes any personal information that is not his or her own is subject to disciplinary action as noted in Chapter 5 of the Erie County Employee Policy Manual as well as possible criminal prosecution. Any breaches of confidential information will be relayed to the Erie County Prosecutor's office as well as to the person it may relate to in the most expedient time possible. Notification of the personal information breach will be made by written notice in the mail if a mailing address is known, via county email system if the breach was to a current employee, or by telephone if a phone number is available. If contact information is not available, notification will be posted on our website as well as released to major newspapers and media outlets.

If an employee of another department uses or distributes personal information maintained in any county-wide shared system, such as the Harris Select Financial system, that is not his or her own, the matter will be brought to the attention of the employee's supervisor and to the employee's appointing authority to handle appropriately. Disciplinary action and public notification of the breach will be the responsibility of that department.

Auditor's Office employees will be given a copy of this policy and offered additional training on the responsibilities of maintaining the confidentiality of personal information as it relates to their job duties. Any new hires will be educated at the time of job orientation. No employee shall knowingly use or disclose confidential personal information in a manner prohibited by law. Any person that violates this may be found guilty of a misdemeanor of the first degree.

After a copy of this policy is given to each employee for review, they will be responsible for listing the personal information they use in their job duties and signing an affidavit noting they read and understood the policy. This will be on kept on file in the Auditor's Office.

A copy of this policy will be posted on the Auditor's website as well as posted within the office for public viewing.