

**CITY OF PICO RIVERA
Administrative Policy**

SUBJECT:		EFFECTIVE DATE:	
Protection of Confidential Information		July 1, 2017	
POLICY #:	SUPERSEDES	STAFF CONTACT	# OF PAGES:
PRIME-01	N/A		4

1.0 Purpose:

To establish a Protection of Confidential Information policy to safeguard confidential customer information. This policy is intended to further the purposes and provisions of Policy #PRIME-05 – Privacy and Customer Confidentiality Policy for Pico Rivera Innovative Municipal Energy.

2.0 Organizations affected:

City of Pico Rivera
All City of Pico Rivera Departments
Pico Rivera Innovative Municipal Energy

3.0 References:

Privacy & Customer Confidentiality Policy #PRIME-05

4.0 Definition of “Confidential Information”:

For purposes of this policy, “confidential information” means information that is generally not considered to be public information, including but not limited to: social security number(s); taxpayer ID number(s); Southern California Edison (SCE) or Pico Rivera Innovative Municipal Energy (PRIME) customer or service account information, including but not limited to customer name(s), service address(es), billing address(es), telephone number(s), email address(es), account number(s) and electricity consumption information.

5.0 Policy – Ensuring Customer Confidentiality is Protected:

To ensure that all employees protect the integrity of the City’s confidential information as well as the confidentiality of others, confidential information may not be shared with unauthorized individuals within or outside of the organization and may not be

transmitted via email; provided that confidential information may be shared or otherwise transmitted as reasonably necessary to conduct PRIME's business operations, to provide services to customers, and/or as required by the California Public Utilities Commission (CPUC).

6.0 Procedure:

- 6.1 Confidential information shall not be transmitted or forwarded to individuals or entities within or outside of the organization that do not have a legal or other authorized need or right to know the information.
- 6.2 Confidential information shall be transmitted via email except as expressly authorized or requested by customer or owner of the confidential information.
- 6.3 Confidential information shall not be posted on the City's website.
- 6.4 Employees shall lock his/her computer when leaving their computer and/or work station.
- 6.5 Passwords shall not be shared with any person and shall be stored physically or digitally.
- 6.6 Documents containing confidential information shall be secured at all times.
- 6.7 Documents containing confidential information shall be shredded or otherwise destroyed when their useful life has expired and in accordance with the City's and/or PRIME's adopted retention schedule, if applicable.
- 6.8 Employees are responsible for any action performed under their user name and password.
- 6.9 Examples of permissible disclosures of confidential information under Section 5.1 of this policy include, but are not limited to, when such disclosure is reasonably necessary to:
 - a) Comply with any law, regulation, or court order;
 - b) Enable PRIME to provide services to its customers;
 - c) Collect unpaid bills;
 - d) Obtain and provide credit reporting information;
 - e) Resolve customer disputes or inquiries;
 - f) Communicate information about demand response, energy efficiency, energy management and conservation programs; or
 - g) In situations of imminent threat to life or property, or to prevent or resolve service interruptions.

- 6.10 If there is uncertainty as to whether disclosure or transmission of confidential information is permissible or required in any given situation, employees shall consult their superior for direction, and the matter may be referred to the City Manager and/or City Attorney's Office for review.
- 6.11 Employees having access to confidential information shall be provided a copy of this policy, and execute a Protection of Confidential Information Policy Acknowledgement.
- 6.12 Failure to comply with the provisions of this policy and procedure may result in discipline, up to and including termination.



René Bobadilla, City Manager

11/13/17

Date

[ACKNOWLEDGMENT FORM FOLLOWS]

PROTECTION OF CONFIDENTIAL INFORMATION POLICY ACKNOWLEDGEMENT

I, the undersigned, have read the Protection of Confidential Information Policy, as well as the related Policy #PRIME-05 – Privacy and Customer Confidentiality Policy for Pico Rivera Innovative Municipal Energy (jointly the “Policy”), and understand the provisions of the Policy. I understand that, to ensure protection of the integrity of the City’s confidential information as well as the confidentiality of others, confidential information may not be shared with unauthorized individuals or entities within or outside of the organization, and may not be transmitted via email; except when the disclosure or transmission of confidential information is expressly authorized by the Policy.

I knowingly and voluntarily accept responsibility for any action performed on my work computer under my user name and password.

I understand that handling and use of confidential information in violation of the Policy may result in employee discipline, up to and including termination.

By signing this acknowledgment, I agree that I have been provided a copy of the Policy, I have reviewed and understand its provisions, I agree to abide by the Policy currently in place and as subsequently revised or amended, and I agree to review periodically any changes or modifications to the Policy. I understand that my regular review of this and other applicable policies is required in the course and scope of my employment.

Employee Name (Print): _____

Employee Signature: _____ Date: _____

Department Head
Signature: _____ Date: _____

(To be filed with Human Resources)