

Type of Decision									
Meeting Date	Friday, Jan. 20, 2012				Report Date	Wednesday, Jan 18, 2012			
Decision Required	X	Yes		No	Priority		High	X	Low
Direction	x	Information Only			Type of Meeting	X	Open		Closed
REPORT TITLE									
Policy & Guidelines for Divulging Personal Information Over The Telephone Report 20/01/12//12/									

Subject: Review and adoption of a resolution to amend the policy and guidelines for divulging personal information over the telephone to a property owner.

RECOMMENDATION: That this resolution be adopted amending how staff can divulge personal information over the telephone and respond to requests for specific tax records requested by a property owner. Currently, we are not sharing information in order to protect the confidentiality of personal information. This is causing some challenges with people who do not live in the area or have access to fax machines to provide a signature for verification to obtain information.

WHEREAS An individual purporting to be the owner of the property who wishes to know their tax account balance or other tax account information may do so as long as staff can validate the identity of the property owner by asking specific questions relating to the tax account, which typically only the owner would know;

AND WHEREAS the change will significantly save time for staff as well as assist the property owner in obtaining tax account information;

AND WHEREAS if staff are not satisfied that the requester is the account holder, staff would forward the information to the address identified on the tax system;

NOW THEREFORE BE IT RESOLVED THAT the Council of the Corporation of the United Townships of Head, Clara & Maria does hereby amend the policy and guidelines for divulging personal information over the telephone to a property owner.

BACKGROUND/EXECUTIVE SUMMARY: There are many tax account related requests purported by a property owner who wish to know specific information on their property tax account. It would make it much easier for the property owner to obtain the information requested via telephone rather than having to come into the office, or for those who do not have access to a fax machine to fax their authorization for the release of information.

The changes are recommended in the current Municipal Tax Administration program as a method to easily provide current information to the property owner while protecting the integrity of the information. The change will allow staff to readily verify account information by checking the tax account screen or by utilizing the history such as the property owner's birth date, mailing address including postal code and roll number. Another option is to set up a unique identification number to access private information and this number would be referenced for all inquiries.

Financial Implications/Budget Impact: None

Policy Impact: Amends current policy but is according to legislation.

Report Prepared by: Noella Lebreton, Treasurer

Approved and Recommended by

Melinda Reith,

Municipal Clerk

Melinda Reith