

TAXPAYER RECORD CONFIDENTIALITY AND SECURITY AGREEMENT

AGREEMENT TEMPLATE FOR TAXPAYER INFORMATION PROTECTION

Employee/Contractor Name: _____

Organization/Agency: _____

Position/Title: _____

Department: _____

1. PURPOSE AND SCOPE

This Agreement sets forth the confidentiality and security requirements for accessing, handling, viewing, or processing federal, state, and local taxpayer information. The individual named above, by signing below, acknowledges the responsibility to protect such sensitive data and agrees to comply with all applicable statutory, regulatory, and policy requirements.

2. DEFINITION OF CONFIDENTIAL TAXPAYER INFORMATION

Confidential Taxpayer Information includes, but is not limited to, any tax return, return information, personally identifiable information (PII), financial records, income statements, social security numbers, employer identification numbers, and any other data received, stored, or processed in connection with tax administration functions, regardless of the media or format (paper, electronic, verbal, or visual).

3. OBLIGATIONS AND CODE OF CONDUCT

The undersigned hereby covenants and agrees to:

1. Access and use Confidential Taxpayer Information solely for authorized, official purposes necessary to perform assigned duties.
2. Protect all electronic and physical forms of Confidential Taxpayer Information against unauthorized access, loss, theft, modification, or disclosure.
3. Refrain from browsing, searching, or viewing taxpayer accounts or records out of curiosity, personal interest, or for any reason not directly required by official duties.
4. Maintain secure passwords, access credentials, and keys, and never share credentials with any other individual, including supervisors or co-workers.
5. Log off, lock, or secure all computer workstations, laptops, mobile devices, and physical filing systems containing taxpayer information when left unattended.
6. Report any suspected or confirmed unauthorized access, disclosure, loss, or theft of taxpayer data immediately, but no later than twenty-four (24) hours, to the designated security officer.

4. STATUTORY PENALTIES AND CONSEQUENCES

The undersigned acknowledges that unauthorized inspection or disclosure of Confidential Taxpayer Information is prohibited by law. Violations may result in severe administrative disciplinary action, including termination of employment or contract, and may subject the individual to civil and criminal penalties, including fines and imprisonment, under applicable federal, state, and local statutes.

5. TERM AND TERMINATION

The obligations under this Agreement shall commence on the date of signature and shall survive indefinitely, remaining in full force and effect even after the termination of the undersigned's employment, contract, or association with the organization.

6. ACKNOWLEDGMENT AND SIGNATURE

By signing below, I certify that I have read, understand, and agree to abide by all the terms, conditions, and security obligations detailed in this Agreement.

Signature:

Date:

Printed Name:

Authorized Representative / Security Officer Acknowledgment:

Signature:

Date:

Name & Title:
