



N - 12: Special (Generic) Accounts

POLICY: See HHS-N-12 Special Accounts, at www.cosdcompliance.org.

DEFINITIONS: See HHS Policy N-13 Security Definitions.

PROCEDURES:

1. **General Requirement** – The following applies to all types of special accounts:
 - a. A county employee must be the 'owner'. The owner is responsible for the management and use of the account and in keeping member or delegated users of the account current.
 - i. Transfer ownership in a timely manner when needed (e.g., Owner retired/terminated employment, transferred out, or job role changed).
 - b. Prior to submitting a request to create an account, obtain written approval from manager/supervisor confirming that the account fulfills a business need. Include the written approval as an attachment in the ServiceNow ticket to show that this step was completed.
 - c. A special account should only be accessed by users' individual account or by delegated permissions to track user activity and maintain individual accountability.
 - d. A special account should not be used for any other purpose that it was not approved for.
 - e. An existing special account can be re-named to further clarify the purpose it serves. However, it cannot be re-named to serve a new purpose. In this case, a new account will need to be created.
 - f. A special account must be deleted in a timely manner when the account is no longer needed.
 - g. Special accounts will be reviewed periodically for quality assurance.
2. **Types of Special Accounts** – The following accounts are allowed to be used to conduct County business as follows:
 - a. Active Directory Generic Account - Active Directory generic accounts are not allowed especially when associated with HHS Protected Information (e.g., PHI, PII) to comply with regulatory requirements. If there is a strong business case that requires an Active Directory generic account, then contact the Office of Ethics and Compliance for further discussion at OEC@sdcounty.ca.gov.
 - b. Shared Mailbox - A shared mailbox provides access to an email inbox designated for communication purposes such as in providing customer service by responding to questions/inquiries about a specific program or service. Multiple users can use and respond from the shared mailbox using their own credentials via delegated permissions (e.g. 'Read-Only', 'Send on Behalf Of', 'Read and Manage'). County employees should consult the 'HHS Shared Inbox Form' available through Business Assurance & Compliance for further guidance. A shared mailbox could also be used to synch with Fax2Mail to receive incoming faxes.

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- c. Email Distribution List – A distribution list allows to send email messages to multiple County employees as a group without having to enter each individual recipient. This type of account is used to communicate with a specific audience to share information.
- d. Calendar Account – A calendar account is used to check availability and to make reservations for a resource such a conference room, vehicle, or other shared item within a department.
- e. Teams Channel & SharePoint Site – A Teams Channel allows for collaboration on a specific topic or project, chat, calls, meetings, and sharing announcements with team members. A SharePoint site is primarily a document management platform to store, collaborate, and share information. For more information on both, contact the Information Technology Services at ITServices.HHSA@sdcounty.ca.gov for assistance.
- f. Local Account – A local account or guest account is configured as a “kiosk” and allows access to Microsoft Office programs (e.g. Word, Excel, PowerPoint) and Internet access for public use. A guest account is not permitted to login to the County Network. For more information, contact the Information Technology Services at ITServices.HHSA@sdcounty.ca.gov for assistance.
- g. Other – Please contact Business Assurance and Compliance for further discussion.

Violations or suspected violations of this policy will be referred to the Agency Human Resources for appropriate personnel action or investigation.

QUESTIONS/INFORMATION: Please contact HHSA Business Assurance and Compliance (BAC) by email at Compliance.HHSA@SDCounty.ca.gov or by phone (619) 237-8571.