

# Storing of Consumer Case Documents and Personally Identifiable Information (PII) in IRIS

Updated June 2014

## Purpose

To communicate to staff that consumer case documents and Personally Identifiable Information (PII) may only be stored in their IRIS Case file.

## Rationale

- Some staff had copies of training grants, ROIs, ERLs, letters to consumers and, in some cases, scanned copies of medical information stored in the V drive.
- The V, S, and H drives as well as your computer desktops (C Drive) are not secure locations.
- Storing consumer case documents and PII in any place except the IRIS case file puts our agency, and you individually, at risk of potentially violating our consumers' confidentiality rights.
- It wastes storage space. There is no need to use, and pay for, electronic storage space for items in two locations.
- Files related to consumers' cases are destroyed/purged on a schedule that is dictated by records retention/disposition authorizations (RDAs) . IRIS files are purged automatically after their retention period has expired. No such purge occurs on other drives.

## Procedure

Ensure that consumer case documents and PII is only stored in the consumer's IRIS case file.