



IWDS 2.0 Reminders – Protecting Customer Information

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Purpose

How to protect customer personally identifiable information (PII) and what to do when a document is uploaded to the wrong file.

Audience

This document is designed to guide local workforce staff who handle customer information in IWDS 2.0.

What is personally identifiable information (PII)?

PII is information that identifies a person on its own or when combined with other information. Examples include Social Security numbers, birthdates, financial account information, and home telephone numbers. Even a name can become sensitive when linked to protected information.

Protect information in your daily work

- **Keep paper files in secure areas.** Do not leave records at desks, printers, copiers, or fax machines. Use approved shredding or secure disposal.
- **Lock your workstation** when you step away. Never share passwords or system accounts.
- **Do not access or store PII on personally owned equipment.** Follow approved security requirements for portable devices and media.
- **Use systems only for authorized business.** Avoid suspicious emails and unauthorized software or hardware.

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Submitting and uploading customer documents

- Customers can upload their documents directly into **IWDS 2.0**.
- If a customer cannot upload documents or does not feel comfortable doing so, they must bring the documents to the office for their Career Planner to upload.
- **Do not ask customers to email pictures or scanned documents.** Customer documents should never be emailed to a Career Planner.
- Confirm that you have the correct customer file and that every page belongs to that customer.
- Review the document for sensitive information. Follow applicable requirements for redaction and documentation.
- Share or access customer information only when needed for your assigned work.

Wrong document or wrong customer file? Act immediately.

1. **Contact your supervisor** or a **Data Steward** or **Super User** in your office immediately. Explain that a document was uploaded incorrectly so they can coordinate the correction.
2. **Have an authorized user remove the incorrect document.** Currently, only users with the **Data Steward** or **Super User** role can delete documents in IWDS 2.0. OET is working to expand this access.
3. **Confirm the correction.** Before uploading new documentation, confirm the document was removed from the incorrect file and, when appropriate, upload it to the correct file. Follow your office's incident reporting procedures. Follow your office's incident reporting procedures.

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