



CSNCFL PROCEDURES

SECTION: Operations	PROCEDURE #: LOPIT02	PAGE 1 of 3
TITLE: Staff Document Management	EFFECTIVE DATE: 04/01/26	
SUPERSEDES: N/A	DATED: N/A	

DISTRIBUTION:

This policy applies to all employees, contractors, and affiliated personnel of CSNCFL, covering all related work activities.

POLICY:

CareerSource North Central Florida (CSNCFL) is committed to maintaining a secure and efficient document management system. This policy outlines the use of Microsoft One-Drive, SharePoint, and Atlas for organizing and sharing documents, ensuring compliance with privacy laws and organizational efficiency.

GUIDELINES:

Microsoft One-Drive

One-Drive serves as the primary tool for personal document storage and sharing among up to three staff members.

Atlas

Atlas is designated as the secure repository for all customer documents containing Private Personal Information (PPI). It adheres to regulatory standards ensuring compliance with data privacy laws.

Document Sharing Guidelines

Personal and Shared Documents: Use One-Drive.

Customer Documents: Always use Atlas.

Using the correct tools helps maintain security and meet regulatory requirements. Data retention policies ensure documents are archived appropriately when moved from One-Drive to other platforms.

Prohibition of Local Storage

Documents should not be saved to local drives or stored on personal devices (e.g., laptops, desktops, external hard drives). Passwords or other information should also never be saved to local drives or laptops, desktops or external hard drives. Exceptions will only be made for temporary access when internet connectivity is unavailable, and prior approval has been obtained from IT or departmental leadership.

Downloads Folder

Files that are downloaded must be deleted or uploaded to approved cloud storage solutions such as OneDrive or Atlas within 24 hours. These files must be deleted after they are successfully transferred.

Security Concerns:

Storing documents locally increases the risk of data breaches, unauthorized access, or accidental exposure of sensitive information, including PPI.

Local storage does not comply with CSNCFL's data protection policies and may lead to disciplinary action for non-compliance.

OFFICIAL SIGNATURE:



PHYLLIS MARTY
Chief Executive Officer



I have read, understand, have received a copy of the **Staff Document Management** policy, and agree to abide by the letter, spirit, and intent of this Policy.

Employee: _____
(Print Name)

Signature: _____
Date: _____

Manager (or)
Supervisor: _____
(Print Name)

Signature: _____
Date: _____