


☒ CalSAWS M&E☐ CalWIN Migration

<b>Distribution Date:</b>	July 7, 2022
<b>To:</b>	PPOC.40; Constortium.RegionalManagers.All; Committee.MediCal_CMSP.All;
<b>CIT Name:</b>	<b>Data Retention – CalHEERS Linkage</b>
<b>From:</b>	CalSAWS Project

PPOCs, please forward to the appropriate impacted staff in your county:

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|---|---|
| <input checked="" type="checkbox"/> General               | <input type="checkbox"/> Reports              |
| <input checked="" type="checkbox"/> Policy                | <input type="checkbox"/> Fiscal               |
| <input type="checkbox"/> CW                               | <input type="checkbox"/> Caseload Movement    |
| <input type="checkbox"/> CF                               | <input type="checkbox"/> Management           |
| <input checked="" type="checkbox"/> MC                    | <input type="checkbox"/> Fiscal               |
| <input type="checkbox"/> CMSP                             | <input type="checkbox"/> Security             |
| <input type="checkbox"/> FC/KG/AAP                        | <input type="checkbox"/> Batch and Interfaces |
| <input type="checkbox"/> Child Care                       | <input type="checkbox"/> Imaging              |
| <input type="checkbox"/> WtW                              | <input type="checkbox"/> Migration            |
| <input type="checkbox"/> Other Program(s) _____           | <input type="checkbox"/> Conversion           |
| <input type="checkbox"/> BenefitsCal                      | <input type="checkbox"/> Technical            |
| <input type="checkbox"/> Customer Correspondence          | <input type="checkbox"/> Training             |
| <input checked="" type="checkbox"/> Other <u>CalHEERS</u> | <input checked="" type="checkbox"/> Help Desk |
| <input type="checkbox"/> Your Benefits Now!               |   |

Description: (Including any step-by-step instructions)	<p><b>Purpose</b></p> <p>The purpose of this CIT is to instruct current CalSAWS users to <b>NOT LINK</b> cases with a CalHEERS Referrals including <b>“Determination Change”</b> types to a case that has a Data Removal status of <b>“In Process”</b> or <b>“Completed”</b> on the Case Summary and Case Data Removal Detail pages.</p> <p><b>Background</b></p> <p>The CalSAWS Data Retention Process (CDRP) removes certain person and program level data from the System. The CDRP removes information from cases if it has been six years since denial or discontinuance and no actions have been taken on the case within that timeframe unless the County overrides the removal. In addition to case data, this process also removes documents and images. Once the Case Data Removal Process is completed, do not take case actions, or attach images or documents to the case. The next Case Data Removal occurrence will occur in August 2022.</p> <p><b>DO NOT TAKE CASE ACTIONS ON SHELL CASES</b></p> <p>Once the Case Data Removal Process has completed, a Shell Case will remain. Do <b>not</b> take case actions or attach images or documents to the Shell Case.</p> <p>When linking a CalHEERS Referral to a CalSAWS case, do not attempt to link to a case that is <b>“In Process”</b> or has <b>“Completed”</b> data removal, the application will</p>
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	<p>prevent this action. Instead select an existing non-shell case or create a new case to link to the referral.</p> <p><b>County Action</b></p> <p>CalHEERS referrals that have been received cannot be linked to a CalSAWS case when the case has a Data Removal status of <b>"In Process"</b> or <b>"Completed"</b> on the Case Summary and Case Data Removal Detail pages. If attempted, the following validation message will appear:</p> <p><b>Select Case – Selected Case has gone through Case Data Removal and cannot be linked.</b></p> <p>Users should follow their county policy to select or create a new case.</p> <p>For MAGI cases in your county that are linked to a Shell Case:</p> <ol style="list-style-type: none"> <li>1. Create a new case for this referral.</li> <li>2. Link the MAGI case to the new case number.</li> <li>3. Create a companion case linkage for the new case number and the Shell Case.</li> <li>4. Journal all case actions according to your county policy.</li> </ol> <p><b>Note - A new Medi-Cal program cannot be pended on a Shell Case.</b></p> <p>Instructions are provided in <a href="#">CIT 0054-22 DRAFT Updated Medi-Cal CalHEERS Case Linkage Job Aid CA – 235353</a> and the Job Aid titled <a href="#">Medi-Cal CalHEERS Case Linkage</a> on how to change/update case linkage. Refer to the section of the job aid titled <b>"MAGI Determination List"</b> to find instructions on how to <b>Request Case Linkage Updates</b>. This functionality was updated in February 2022.</p> <p>If you have questions on this CIT, please reach out to the Primary Contact listed below and cc your Regional Manager(s).</p>
Primary Project Contact: (Name and email address)	<p>Henry Arcangel <a href="mailto:ArcangelH@CalSAWS.org">ArcangelH@CalSAWS.org</a></p>
Backup Project Contact: (Name and email address)	<p>Maureen Votta <a href="mailto:VottaM@CalSAWS.org">VottaM@CalSAWS.org</a></p>
Attachments:	<p>None</p>
Web Portal Link:	<p></p> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> <li>1. Click on the CRFIs &amp; CITs link at the top of the page.</li> <li>2. Click on the "CalSAWS Information Transmittal (CIT)" folder.</li> <li>3. Click on the "2022" folder.</li> </ol> <p>Click on the appropriate CIT # folder.</p>