

Confidential Case

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Purpose

The purpose of this job aid is to provide instructions for creating a Confidential case, identify who can view or edit a confidential case, and how to prevent data from a confidential case from being sent to the Self-Service Portal.

Who Has Access to a Confidential Case?

When a case is marked Confidential, only individuals with the correct Security Group can access the case or images in the System. This security is set based on county policy. Only county staff with the correct security assignment have access to view or edit the case.

Types of Confidentiality

There are multiple reasons why a case may be marked as confidential. It is up to the county to decide which of the following will be used based on county policy. The User will select one of the following types when setting the case as confidential. Each Type identifies what type of case it is and the reason for making the case confidential.

- Adoptions Assistance
- CWS AAP Mask Address
- CWS Foster Care/KinGap Mask Address
- CWS Sealed Mask Address
- CWS Sensitive Mask Address
- Domestic Violence
- Employee/Employee Relative
- Foster Care
- High Profile
- Human Trafficking
- Minor Consent

Navigation to the Confidentiality Detail Page

There are two ways to navigate to the Confidentiality Detail page in the System. The User can access the page through Case Info or Eligibility Global navigation.

Step	Action
1.	Place the cursor over Case Info or Eligibility on the Global navigation bar.
2.	Select Case Summary from the Local navigator.
3.	On the Case Summary page: a) Select Confidentiality from the Task navigator.

Confidentiality

Users who have the ability to add and edit data collection pages can add a Confidentiality record to establish a case as confidential.

Users, with the correct security, which is different from users who can add a record, can edit or remove a confidentiality record after the record is created and the case is confidential.

Note: Adding a confidentiality record does not prevent the case data from being sent to the Self-Service Portal.

Add Confidentiality to a Case

Step	Action
1.	Place the cursor over Case Info or Eligibility on the Global navigation bar.
2.	Select Case Summary from the Local navigator.
3.	On the Case Summary page: a) Select Confidentiality from the Task navigator.
4.	On the Confidentiality Detail page: a) Click the Add button. b) Select the Type from the drop-list. c) Enter a Comment in the text box. d) Click the Save and Return button. e) Click the Close button.

Edit Confidentiality for a Case

Step	Action
1.	Place the cursor over Case Info or Eligibility on the Global navigation bar.
2.	Select Case Summary from the Local navigator.
3.	On the Case Summary page: b) Select Confidentiality from the Task navigator.
4.	On the Confidentiality Detail page:

Step	Action
	a) Click the Edit button. b) Change any data as necessary. c) Click the Save and Return button. d) Click the Close button.

Remove Confidentiality from a Case

Step	Action
1.	Place the cursor over Case Info or Eligibility on the Global navigation bar.
2.	Select Case Summary from the Local navigator.
3.	On the Case Summary page: c) Select Confidentiality from the Task navigator.
4.	On the Confidentiality Detail page: a) Click the Remove button.

Prevent Customer Data From Being Sent to the Self-Service Portal (SSP)

Customers or County Policy may have a need to prevent case data from being sent to the SSP for Customer viewing due to the nature of the confidentiality and the added need for privacy of the Customer. Users will need to add a Customer Privacy record to prevent the transfer of case data to the SSP. See **JA – SSP -Customer Privacy** for instructions.