

- CalSAWS M&E       CalWIN Migration

<b>Distribution Date:</b>	August 10, 2022
<b>To:</b>	PPOC.All; Consortium.RegionalManagers.All; Committee.SelfServicePortal.All; HelpDesk.All
<b>CIT Name:</b>	<b>Job Aids for Customer Privacy &amp; Confidential Case</b>
<b>From:</b>	CalSAWS PMO

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

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> General      | <input type="checkbox"/> Reports              |
| <input 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 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"/> Your Benefits Now!      | <input checked="" type="checkbox"/> Training  |
| <input type="checkbox"/> Customer Correspondence | <input checked="" type="checkbox"/> Help Desk |
| <input type="checkbox"/> Other _____             |   |

<b>Description:</b>	<p><b>Purpose</b> The purpose of this CIT is to provide CalSAWS counties with information regarding the Customer Privacy and the Confidential Case pages in CalSAWS and to distribute the new job aids for these functional areas.</p> <p><b>Background</b> The attached job aids were created to provide additional context regarding the Customer Privacy pages, how those pages relate to the Confidential Case pages within CalSAWS, and how creating either of these types of records interact with the Self-Service Portal (SSP). These job aids were created to assist county staff with an understanding the privacy functionality.</p> <p><b>Additional Information:</b> <i>Confidential Case:</i> Users can set a case as Confidential by navigating to the Confidentiality Detail page, adding a record, and setting the type or reason for the confidentiality. By setting the record, the case will only be viewable by staff who have the correct security group to access this type of case. Setting this record does NOT prevent the system from sending case information to the SSP.</p> <p><i>Customer Privacy:</i></p>
---------------------	---

	<p>The Customer Privacy page, when added, will stop all information from being sent to the SSP for Customer viewing. Setting a Customer Privacy record does NOT make the case Confidential.</p> <p>The following SCRs will add the two job aids to the system with release 22.11.</p> <ul style="list-style-type: none"> <li>• CA-247890 – Create New Job Aid for Confidential Cases</li> <li>• CA-247891 – Update JA e-Applications &amp; Create New Job Aid – SSP Customer Privacy</li> </ul> <p><b>County Action:</b> None</p> <p>If you have questions regarding this CIT, please reach out to the Primary Contact listed below and cc your Regional Manager(s).</p>
Primary Project Contact:	<p>Connie Buzbee <a href="mailto:BuzbeeC@CalSAWS.org">BuzbeeC@CalSAWS.org</a></p>
Backup Project Contact:	<p>Dymas Pena <a href="mailto:PenaD@CalSAWS.org">PenaD@CalSAWS.org</a></p>
Attachments:	<p>CIT 0229-22 JA Customer Privacy.docx CIT 0229-22 JA Confidential Case.docx</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> <li>4. Click on the appropriate CIT # folder.</li> </ol>

