

☒ CalSAWS M&E ☐ CalWIN Migration

Distribution Date:	February 14, 2024
To:	PPOC.40: Consortium.RegionalManagers.All
CIT Name:	CalSAWS Case Data Removal Schedule For 2024; Case Data Removal Identification and Case Data Removal Override Reports (02/13/2024)
From:	CalSAWS Project

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

- | | |
|---|---|
| ☒ General
☐ Policy
☐ CW
☐ CF
☐ MC
☐ CMSP
☐ FC/KG/AAP
☐ Child Care
☐ WtW
☐ Other Program(s) _____
☐ BenefitsCal
☐ Customer Correspondence
☒ Other <u>CalSAWS Data Retention</u> | ☐ Reports
☐ Fiscal
☐ Caseload Movement
☐ Management
☐ Fiscal
☐ Security
☒ Batch and Interfaces
☐ Imaging
☐ Migration
☐ Conversion
☐ Technical
☐ Training
☒ Help Desk |
|---|---|

Description:	Purpose [REDACTED] CIT 0401-23 informed counties the CalSAWS Case Data Removal Schedule for 2024. The purpose of this CIT is to update the Counties on phase 2 of the CalSAWS Data Retention Policy (CDRP) program batch execution run for 2024. This only affects Los Angeles County and the previous C-IV Counties. Background Approved by the JPA Board in 2019, the CDRP provides guidelines for how long to retain case data in CalSAWS once a case has been closed. The series of batch programs that implements this policy was last run in CalSAWS in 2022. See CIT 0088-22 [REDACTED] for reference. The CalSAWS Data Retention Policy is scheduled to occur on an annual basis, once a year. This CIT announces the beginning of the case review period January 9th, 2024, through May 2nd, 2024. SCR CA-247899; CalSAWS Case Data Removal 2024 Run Cases Identification & Validation has completed. Additional Information SCR CA-247899; CalSAWS Case Data Removal 2024 Run Cases Identification & Validation is currently in design. The CalSAWS Case Identification batch run date
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will run on **Jan 5th, 2024**. This batch job identifies all the cases in the System that meet the criteria for data removal. **Completed**

The **Case Data Removal Identification Report** provides each County a listing of cases identified for removal. This report will run on **January 8th, 2024**. **Completed**

The Case Data Removal Identification Report is completed.

The Case Data Removal Identification and Case Data Removal Override Report will then run on the 11th business day of every month.

The Case Data Removal Identification and Case Data Removal Override Report dated February 13th, 2024 is completed.

SCR CA-271043; CalSAWS Case Data Removal 2024 Run Scheduling will begin the removal of data for the identified cases. The Case Data Removal batch job will kick off on **May 3rd, 2024**. The job will be scheduled to run during batch hours between 8:00 PM to 6:00 AM. System down time will not be scheduled for this effort.

This provides counties **four** months to review their list of Identified cases prior to data actually being removed from the System.

On May 3rd, 2024, at 8:00 PM, an archive will be taken and stored. The stored archive will be available for six months.

County Action

All cases identified on the Case Data Removal Identification Report should be evaluated during the review period, **January 9th, 2024, through May 2nd, 2024**, prior to the date of the Case Data Removal process beginning.

The Case Data Removal Identification Report is completed. Counties may begin their review process.

The Case Data Removal Identification and Case Data Removal Override Report dated February 13th, 2024 is completed.

The reports are accessed using the following navigations:



Homepage > Reports > Scheduled > Case Activity > Title = 'Case Data Removal Override Report'.

Cases on the Case Data Removal Identification Report can be overridden for any of the agreed upon Override Reasons listed on the Data Removal Detail page.

Once a case has been identified by the batch process, the Case Summary page will display as shown below. If an Override needs to be performed, click the **"Identified"** hyperlink under the Data Removal Status to navigate to the Detail page. This action will take you to the Override section.

CalSAWS Case Name: Case Name Case Number: Journal Tasks Help Resources Page Mapping Imaging Log Out

Riverside SYS4 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Case Summary

Case Number: Go

Person Search EBT Account Search Application Registration Case Summary Contact Authorized Representative Application Questions Negative Action New Program New Person Hide Person EBT Account List Issuance History Auxiliary Authorization List Expungement History Child Support Collections Time Limit Aid Summary Case Flag Legacy Case Confidentiality ICT Summary

Case Summary

Images Capture Generate Coversheet

Case Name Case Name County Riverside

Data Removal Status Identified Edit Identification Date 02/15/2022

Companion Cases

Case Number ☐ Case Name Case Name Add Remove

Self-Service Portal

Display: 05/01/2022 View

CalWORKs

CalFresh

CFET

CalSAWS Case Name: Case Name Case Number: Journal Tasks Help Resources Page Mapping Imaging Log Out

Riverside SYS4 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Case Summary

Case Number: Go

Person Search EBT Account Search Application Registration Case Summary Contact Authorized Representative Application Questions Negative Action New Program New Person Hide Person EBT Account List

Case Data Removal Detail

*- Indicates required fields

Data Removal Status: * Override Identification Date 02/15/2022

Override Reason: *

Board of Supervisors Decision
Hearing/Court Order
Pending Litigation
Under QA/QC Review

Save and Return Cancel

Save and Return Cancel

Any Case where the Data Removal Status is set to Override will appear on the Case Data Removal Override Report.

Any cases left in Identified status on the date the Data Removal batch process runs will have data removed. Once data has been removed from a Case, it becomes a Shell Case:

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| | <ol style="list-style-type: none">1. Click on the CRFIs & CITs link at the top of the page.2. Click on the "CalSAWS Information Transmittal (CIT)" folder.3. Click on the "2024" folder.4. Click on the appropriate CIT # folder. |
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