

Distribution Date	March 14, 2025
To	PPOC.58;
CC	Consortium.RegionalManagers.All; Consortium.SectionDirectors;
CIT Name	2025 Case Data Removal Identification and Override Reports for March 2025

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

- | | |
|--|--|
| <input checked="" type="checkbox"/> General | <input checked="" 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 checked="" type="checkbox"/> Batch and Interfaces |
| <input type="checkbox"/> CMSP | <input type="checkbox"/> Fiscal |
| <input type="checkbox"/> FC/KG/AAP | <input type="checkbox"/> GA/GR |
| <input type="checkbox"/> Child Care | <input type="checkbox"/> Help Desk |
| <input type="checkbox"/> WtW | <input type="checkbox"/> Imaging |
| <input type="checkbox"/> Other Program(s) _____ | <input type="checkbox"/> Security |
| <input type="checkbox"/> BenefitsCal | <input type="checkbox"/> Task Management |
| <input type="checkbox"/> Customer Correspondence | <input type="checkbox"/> Technical |
| <input type="checkbox"/> OCAT | <input type="checkbox"/> Training |
| <input type="checkbox"/> Other _____ | |

Description

Purpose

The purpose of this CIT is to notify Counties that the Case Data Removal Identification Report was run January 10th, 2025 in accordance with the CalSAWS Data Retention Policy (CDRP) schedule promulgated in CIT 0185-24.

Background

The CDRP provides guidelines for how long to retain case data in CalSAWS once a case has been closed. The CalSAWS program team executes a series of batch jobs to implement this policy on an annual basis.

Additional Information

SCR [CA-284677](#), titled "CalSAWS Case Data Removal 2025 Run Cases Identification & Validation", was deployed into production on January 10th, 2025. This SCR identified the CalSAWS cases that met the criteria for data removal and created the Case Data Removal Identification Report.

The subsequent Case Data Removal Identification and Case Data Removal Override Reports will run on the 11th business day of every month. For the month of March, the reports were run on March 12th, 2025

SCR [CA-284678](#), titled "CalSAWS Case Data Removal 2025 Run Scheduling", will begin removal of data for the identified cases on May 9th, 2025 between 8:00 PM to 6:00 AM.

This provides counties four months to review their list of cases Identified for data removal prior to data being removed.

County Actions

All cases identified on the Case Data Removal Identification Report should be evaluated during the review period, **January 10th, 2025, through May 9th, 2025.**

The Case Data Removal Identification and Case Data Removal Override Reports dated March 12th, 2025, are completed. Counties may begin their review process.

The reports are accessed using the following navigations:

The screenshot shows the CalSAWS web application interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. The main navigation menu on the left lists various modules: San Bernardino PROD, Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The 'Reports' module is selected, and the 'Scheduled' report type is chosen. The 'Report Search' section displays a table of search results for 'Case Data Removal Identification Report'. The table has columns for Title, Program, Aid Code, Report Date, and Run Date. The results show a list of reports scheduled from 04/01/2024 to 02/01/2025, with the most recent report (02/01/2025) highlighted in red. The table indicates 26 results out of 36, with pagination links for 'Previous' and '1 2'. A status message at the bottom states 'This Type 1 page took 0.35 seconds to load.'

Title	Program	Aid Code	Report Date	Run Date
Case Data Removal Identification Report			04/01/2024	05/12/2024
Case Data Removal Identification Report			05/01/2024	06/12/2024
Case Data Removal Identification Report			06/01/2024	07/12/2024
Case Data Removal Identification Report			07/01/2024	08/13/2024
Case Data Removal Identification Report			08/01/2024	09/12/2024
Case Data Removal Identification Report			09/01/2024	10/12/2024
Case Data Removal Identification Report			10/01/2024	11/13/2024
Case Data Removal Identification Report			11/01/2024	12/12/2024
Case Data Removal Identification Report			12/01/2024	01/13/2025
Case Data Removal Identification Report			01/01/2025	02/12/2025
Case Data Removal Identification Report			02/01/2025	03/12/2025

The screenshot shows the CalSAWS web application interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. The main navigation menu on the left lists various modules: San Bernardino PROD, Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The 'Reports' module is selected, and the 'Scheduled' report type is chosen. The 'Report Search' section displays a table of search results for 'Case Data Removal Override Report'. The table has columns for Title, Program, Aid Code, Report Date, and Run Date. The results show a list of reports from 04/01/2024 to 02/01/2025, with the last entry highlighted in red. A status bar at the bottom indicates the page took 0.36 seconds to load.

Search Results Summary				
Results 26 - 36 of 36				
Title	Program	Aid Code	Report Date	Run Date
Case Data Removal Override Report			04/01/2024	05/12/2024
Case Data Removal Override Report			05/01/2024	06/12/2024
Case Data Removal Override Report			06/01/2024	07/12/2024
Case Data Removal Override Report			07/01/2024	08/13/2024
Case Data Removal Override Report			08/01/2024	09/12/2024
Case Data Removal Override Report			09/01/2024	10/12/2024
Case Data Removal Override Report			10/01/2024	11/13/2024
Case Data Removal Override Report			11/01/2024	12/12/2024
Case Data Removal Override Report			12/01/2024	01/13/2025
Case Data Removal Override Report			01/01/2025	02/12/2025
Case Data Removal Override Report			02/01/2025	03/12/2025

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: 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: ☐ Remove Case Name: Case Name Add

Self-Service Portal

Display: 05/01/2022 View

CalWORKs

CalFresh

CFET

CalSAWS Case Name: Case Name Case Number: 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 run will have data removed. Once data has been removed from a case, it becomes a shell case:

CalSAWS Case Name: Case Name Case Number: 22

Journal Tasks Help Resources Page Mapping Imaging Log Out

San Bernardino 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 Housing Support Home Visiting Legacy Case

Case Summary

Case Name [Case Name](#) County San Bernardino

Data Removal Status [Complete](#) Identification Date 09/11/2020 Completion Date 06/02/2021

Companion Cases

Case Number	Case Name

Add

Display: 01/01/2022 View

All People Associated with the Case

Name	DOB	Age	Gender	SSN	CIN	Person #	Household Status
	03/07/1947	74	M			01	

Images

This Type 1 page took 0.41 seconds to load.

Data Removal Process Job Aid

Counties should review the **Data Removal Process** job aid for more information.

Please open a Service Now (SNOW) ticket if you encounter any problems during the review period. Possible concerns could be cases identified that do not meet the criteria. When completing SNOW tickets, assign to the **'Batch and Interfaces'** group.

A CIT will be distributed at the end of the case review period, and [CA-284678](#), titled "CalSAWS Case Data Removal 2025 Run Scheduling" will begin the removal of data for the identified cases. The Case Data Removal batch job will commence on **May 9th, 2025**.

Please copy your Regional Manager(s) on any questions you send to the Primary or Backup Project Contact.

Primary
Project
Contact

Prem Venugopalan
VenugopalanP@CalSAWS.org

Backup
Project
Contact

Grady Howe
HoweG@CalSAWS.org

Attachment
s

None

Web Portal
Link

OR

You may also retrieve the CIT document and attachments by following these steps:

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 "2025" folder.
4. Click on the appropriate CIT # folder.