Casey Life Skills Retention Policy FAQs

Why are we implementing a retention policy on Casey Life Skills?

- To clean up data, control data costs, improve site performance, and reduce the risk of maintaining out-of-date records.

What data is being removed?

- Assessments that have not been modified in more than two years.
- Youth and caregiver records that do not have assessments assigned and were created more than one year prior.

When will assessments be removed?

- We are applying a two-year retention policy to assessments, meaning that any assessments that were modified more than two years from today’s date will be permanently deleted.
- The record deletion process will run monthly.

When will youth and caregiver records be removed?

- We are applying a one-year retention policy to youth and caregiver records meaning that any youth or caregivers in the system without a completed assessment within one year will be removed.

What happens if my youth is removed and they want to take an assessment?

- Use the “Add new youth” function to re-add the youth to your provider account.

Can I restore assessments or youth records that have been deleted?

- No, we are not archiving any data.

Can I prevent my assessments from being removed?

- Possibly. Please contact cls@casey.org with the business reason for having your account excluded from the retention policy, and your request will be evaluated.

When will the retention policy start removing data?

- Data will be removed starting in June 2017.

Can I retrieve my assessment data before it is removed?

- Yes, use the “Export All Assessment Responses” link on the Reports page in CLS to export all of the assessment data for your provider account. See the CLS site for documentation on the data extract file.

Can I see a list of what assessments will be removed for my organization?

- Yes. Using the Export All Assessment Responses function mentioned above, you can look for any assessments with a “modified date” nearing two years old. Those are the assessments that will be deleted once they exceed a modified date of more than two years prior.

What if the report doesn’t show all of my youth?

- If you run the report and don’t see all of your youth, you may have multiple provider accounts for your organization in the system. Contact CLS@casey.org for help identifying and merging accounts.