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Menu: PURGE                UFS File Purge Processes                User ID: KANABO
10/16/15 09:34:46

1. Operations Paid Invoices                21. Purge Check Files
2. Operations Purchase Orders
3. Operations Vendors

4. Client Trust Trust files

5. POS Invoices
6. POS Authorizations
7. POS Rate Table deleted records
8. POS Vendor Detail
9. POS Vendors
10. POS Turnaround Invoices

11. Client Trust Deleted Clients

                                90. Sign off

Selection or Command
==> _____

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The purge process uses the system fiscal year and a regional center specified number of years to maintain fiscal data (minimum 5 fiscal years). If you do not know the number of years you are maintaining records, please speak with your system operator. Or, the purge process allows user input to determine the number of years to purge (as long as date entered maintains records within the last 5 fiscal years).

- The following purges use the “number of fiscal years to maintain” indicator without user input:
 - Operations Paid Invoices
 - Operations vendors
 - POS Invoices
 - POS Vendor Detail

- The following purges allow user to enter a date, and the program will ensure that at least five fiscal years of data remain
 - Client Trust Files
 - POS Authorizations

- The remaining purges do not rely on date logic but will only purge records based on other criteria:
 - Operations Purchase Order – Will purge if it is completed
 - POS Rate Table deleted records – These records will only purge if they have been transmitted. Mark as D status, transmit, and then purge.

- POS Vendors - Marked as D status. Will only purge if associated records are in D status or have already been purged.
- POS Turnaround Invoices
- Client Trust Deleted clients - Marked as D status. Will only purge if associated records are in D status or have already been purged.
- Purge Check Files – Allows the user to enter a user determined date. This file is archived as part of the purge process.

Things to Consider and Cautions

- You must have a dedicated system for any Purges
- Be sure you have a good backup from the night before and run the purge in the morning so that AST support staff is available for any issues.
- It is recommended that you purge in menu order.
- Rates, Vendors, Consumers and Client trust will delete the records marked as D status. Do not mark those in D status unless you are serious about deleting them. Be really careful especially with trust and rates.

Files Involved with Each Purge Option

Operations Paid invoices – APCTRL – APPAYH – APPAYK – APPAYL

Operations Purchase Orders – POFILE – POCTRL

Operations Vendors – VENDOR – TN99O

Client Trust – Trust Files – SUBACT – CTRANS – PSRCFN – CSOFT – ARCTRL – ARFILE – DUETO – D1CTRL – D1FILE – CSACCT – BURIAL – WAGES

POS Invoices – PAPCTL – PSPPYL – PSPPYM

POS Authorizations – PSPTHA – PSPTHB – PSPTHC – PSPTHF – PAUTHM – PAUTHS

POS Rate Table (Deleted Records) – PSRATE

POS Vendor Detail – PVDSLVL

POS Vendors – PVNDOR – TN99P

POS Turnaround Invoices – PINVOI (This does not purge the web invoices)

Client Trust – Deleted Client records – CSTMR – CSTMRC

Purge Check files – CHECKO -CHECKP