



# [CA-270162] Customer Reporting Returned Mail- Undeliverable Report

Created: 11/01/2023 02:56 PM - Updated: 05/02/2024 03:29 PM

<b>Status:</b>	Committee Review		
<b>Project:</b>	CalSAWS		
<b>Component/s:</b>	None		
<b>Fix Version/s:</b>	None		

<b>Type:</b>	CER		
<b>Reporter:</b>	Frederick Gains	<b>Assignee:</b>	Rhiannon Chin
<b>Labels:</b>	None		

*Main*

**Region #:** 5  
**County:** Orange  
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**Request:** Currently, when a Customer Reporting document, such as Medi-Cal RE, CalFresh SAR7, and RE, is returned undeliverable, it is captured under the general "Returned Mail" Form Name and Number. However, this inadvertently combines the undeliverable Customer Reporting with other returned mail items such as Client Correspondence. As a result, counties are unable to determine which cases have a true Customer Returned Mail. They are unable to separate them from customers who did not submit renewals, and both types of cases will be flagged for discontinuance. To ensure more effective business utility, it is imperative to enhance the system's capabilities by segregating and capturing the data specifically for Customer Reporting that are returned as undeliverable. This modification will enable us to streamline the handling of undeliverable Customer Reporting for appropriate business purposes.

**Recommendation:** In order to capture the Customer Reporting returned mail, we would like to propose following system enhancements:

1. Create New Dropdown Value in:  
Eligibility => Reporting => Customer Reporting Detail Status  
Add Status Value of "Returned – Undeliverable"
2. Create Perceptive rules so that when a document is scanned using the Returned Mail Capture/ Scan mode, if it is a Customer Report  
Update Status in Eligibility => Reporting => Customer Reporting Detail Status to "Returned - Undeliverable"
3. Returned Mail task should include the Customer Reporting information under Long Description (Case Number, Form Name, Form Number, Program, Reporting due month)
4. Update all current Reports for Customer Report to include the new reporting status (Returned – Undeliverable).  
Impacted reports include but not limited to:
  - Customer Reporting Progress Detail Report
  - Customer Reporting Progress Report
  - Employment Services Customer Reporting Report
  - Monthly Productivity List Export Report
  - Medi-Cal Renewals Listing Report
  - DHCS Renewals Master Request Report

**Priority/ Implementation Consideration(s):** This request is very high priority. Our agency director has requested returned mail reports and we are unable to generate this information without this change. In the interim, only manual stats can be utilized and staff are gathering and assembling the information bi-weekly.

**Area(s) Impacted:** Imaging, Page Change, Reports, Task Mgmt

**Committee:** Imaging, State/Fiscal Reports, Task Management

**Attachments**

CalSAWS Enhancement Request Form- Customer Reporting Returned Mail.docx (42 kB)

**Comments**

*Dymas Pena added a comment - 02/21/2024 09:11 AM*

Reviewed request with Rhiannon, this appears to be both an Imaging and Reports update. Reassigned to Rhi.