

Design

CA-293533

Auto update addresses from Return Mail verified source

| CalSAWS | DOCUMENT APPROVAL HISTORY | | |
|------------|---------------------------|---|------------------------|
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| 12/18/2025 | 1.2 | Editing Automated Action for out of state | Finnegan Dewitt |
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| | | And correct flag track requirement. | |
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| 3/26/2026 | 1.15 | Content Revision 2 – Made Task Types and Task Category editable by the counties. | Finnegan Dewitt |
| 4/1/2026 | 1.16 | Design Clarification – Modified 2.5.3 to make it clear that the Task Types are not System Task Types. | Finnegan Dewitt |
| 4/9/2026 | 1.17 | Content Revision – Updated CA-293533_File_Layout.xlsx supporting document to make fields not mandatory and increase the length of NCOA move description | Edgars Reinholds |
| 4/13/2026 | 1.18 | Content Revision 3 update - Updated CA-293533_File_Layout.xlsx supporting document | Edgars Reinholds |

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| | | with additional fields to be not required. | |
| 4/15/2026 | 1.19 | Revert 1.18. Update those fields to have default values. | Edgars Reinholds |
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| 4/20/2026 | 1.21 | Design clarification. Gainwell will post the file directly to S3 bucket. | Edgars Reinholds |
| 4/24/2026 | 1.22 | Update layout with increased length for NOA form number and JobSource fields. Updated update rules supporting document with the latest requirement revisions. | Edgars Reinholds |

Table of Contents

| | | |
|----------|---|-----------|
| 1 | OVERVIEW | 1 |
| 1.1 | Current Design | 1 |
| 1.2 | Requests | 1 |
| 1.3 | Overview of Recommendations | 1 |
| 1.4 | Assumptions..... | 1 |
| 2 | RECOMMENDATIONS | 2 |
| 2.1 | Batch – Create a Secure File Transfer Protocol (SFTP) job | 2 |
| 2.2 | Batch – Create Return Mail Decryption job | 4 |
| 2.3 | Interface – Create a Return Mail Reader job | 4 |
| 2.4 | Automated Actions | 16 |
| 2.5 | Task Types | 28 |
| 2.6 | Task Category – Mail Address Change..... | 33 |
| 2.7 | Eligibility Rules Updates – No Impact..... | 34 |
| 2.8 | eHIT – No Impact..... | 35 |
| 2.9 | Notification of Mailing Address Update Form | 36 |
| 2.10 | Report Name – No Impact..... | 41 |
| 2.11 | Data Warehouse Name – No Impact..... | 42 |
| 2.12 | Data Change – No Impact..... | 42 |
| 2.13 | Automated Regression Test – No Impact | 43 |
| 3 | SUPPORTING DOCUMENTS | 44 |
| 4 | OUTREACH | 45 |
| 4.1 | Lists | 45 |
| 5 | APPENDIX | 46 |

CA-293533 – Auto update addresses from Return Mail verified source

1 OVERVIEW

This SCR will automate the processing of Return Mail Address Change report.

1.1 Current Design

Correspondence sent from CalSAWS can result in return mail from US Postal Service (USPS). The return mail is either undeliverable or with an incorrect address where an updated address is available. Return mail arrives at the return address on the envelope within 2 to 6 weeks after being mailed.

A mail piece can be identified as undeliverable or with an incorrect address at the time of mailing by using Coding Accuracy Support System (CASS) and National Change of Address (NCOA) services. For Counties using the Electronic Return Mail Notification service, Central Print sends a transaction for each mail piece to USPS CASS and NCOA services. USPS returns an official notification of what will happen with that mail piece. The results are shared with the Counties in a report or a task, and a journal entry.

1.2 Requests

Automatically update program addresses for returned mail, following the policy outlined in ACWDL 25-06.

1.3 Overview of Recommendations

1. Receive and process file containing the return mail address update request from Gainwell.
2. Update participant's address based on information received from Gainwell.
3. Implement skips and create tasks for the records for which the addresses are not updated.
4. Create journal entries when tasks are created and addresses are updated.
5. Send applicable correspondence based on the policy outlined ACWDL 25-06.
6. Create a task to resend the documents when addresses are updated.

1.4 Assumptions

1. CA-286076 will implement a standardized process to update addresses.
2. Central Print (Gainwell) will opt-in remaining counties in the automated return mail process.

3. Gainwell will no longer create tasks or journal entries but only transmit the report to CalSAWS.
4. The Task Type of each new Automated Action will be modifiable by the counties.
5. When a change in address is reported the Voter Registration Card and Preference Form should be automatically mailed. This will be handled by SCR CA-204795.
6. No resend returned mail functionality will be added.
7. Gainwell will continue to whitelist and exclude addresses from the report which USPS indicates as needing updates, but the county confirmed that everything on the address is correct.
8. Gainwell will consolidate individual county return mail reports into one single report before transmitting it to CalSAWS. This may be up to 3 days after the print files were received on their end.
9. Gainwell will continue to provide the counties with the existing report in the existing format in addition to the consolidated report provided to CalSAWS.
10. FTP and Decryption batch jobs are not required as the return mail report can be replicated between Gainwell and CalSAWS S3 buckets directly. Gainwell to transfer the file directly to CalSAWS Return Mail Reader job S3 bucket.

2 RECOMMENDATIONS

Create a new interface to process the Return Mail Address Change Report received from Gainwell. Update participant's address based on the Return Mail Address Change Report. Create journal entries when addresses are updated. Create tasks and journal entries when unable to update the address. Send a notice when address has been auto updated.

2.1 Batch – Create a Secure File Transfer Protocol (SFTP) job

2.1.1 Overview

Create a Security File Transfer Protocol (SFTP) batch job to receive the Returned Mail report.

2.1.2 Description of Change

1. Create a Security File Transfer Protocol (SFTP) batch job to receive the Returned Mail report.
2. Gainwell will push the file to CalSAWS SFTP server.
3. File format: CSV and PGP encrypted.
4. File name: AddressCorrectionReport_YYYYMMDD.csv.pgp

2.1.3 Execution Frequency

Daily Mon-Sat excluding Sunday and Holidays.

2.1.4 Key Scheduling Dependencies

Successor: Return Mail Decryption

2.1.5 Counties Impacted

All Counties.

2.1.6 Category

Core.

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

2.2 Batch – Create Return Mail Decryption job

2.2.1 Overview

Create a Return Mail decryption job to decrypt the PGP file.

2.2.2 Description of Change

1. Create a Return Mail decryption job to decrypt the PGP file.

2.2.3 Execution Frequency

Daily Mon-Sat excluding Sunday and Holidays.

2.2.4 Key Scheduling Dependencies

Predecessor: Return Mail Inbound SFTP job

Successor: Return Mail Reader job

2.2.5 Counties Impacted

All Counties.

2.2.6 Category

Core.

2.2.7 Data Volume/Performance

N/A

2.2.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

2.3 Interface – Create a Return Mail Reader job

2.3.1 Overview

Create a Return Mail interface to process the report provided by Central Print. The report contains results of USPS CASS and NCOA services for mail pieces that will be returned.

2.3.2 Description of Change

1. Create a Return Mail interface to process the daily report provided by Central Print. The report contains results of USPS CASS and NCOA services for mail pieces that will be returned.
 - a. Format will be Comma Separated Values (CSV)
 - b. Escape character: Double quotes ("") for the field needing an escape
 - c. File name: AddressCorrectionReport_YYYYMMDD.csv
 - d. File Layout: Refer to "CA-293533 - File Layout.xlsx" supporting document.
 - e. File will not have a trailer line.

2. Address update rules define when to update the address, create a task and a journal. Refer to "Address_Update_Rules.xlsx" supporting document.
 - a. Update the address when the following conditions are met:
 - i. The address information on the report is matched to the information in CalSAWS using the following fields.
 1. "County Code"
 2. "Case Number"
 3. "Correspondence ID"
 4. "Recipient Name" matches a person's name (FirstName MiddleName (initial) LastName Suffix OR FirstName MiddleName LastName Suffix) or an organization's name (ORG.ORG_NAME).

Note: Generated documents can be associated with a Person, Organization, or an Authorized Representative (also a person, non-case person, or an organization).

If the address information is for an organization without a link to a case (GENERATE_DOC.CASE_ID and GENERATE_DOC.PGM_ID are null), then it's considered as no match.
Organizations and Authorized Representatives would not have a household status. These records would not be updated but may get a Task and/or a Journal Entry.
 - ii. The current address reported is the Primary Applicant's mailing address. A match is determined when all the following fields are the same in CalSAWS Address Detail page:
 1. "Current Address Line 1" field matches CalSAWS Address Line 1 and Line 2 combined (separated by space)
 2. "Current Address City"
 3. "Current Address State"

4. "Current Address Zip" field matches CalSAWS address Zip Code-Zip Suffix (separated by hyphen).
- iii. New address is provided in the report. "New Address Line 1" field is not "Corrected address not available".
- iv. New address is different from the current address in the report.
- v. The case does not have the following conditions:
 1. Domestic Violence Flag (any of the following conditions)
 - a. Domestic Violence flag (Title contains the word 'Domestic', case insensitive).
 - b. Case confidentiality of type "Domestic Violence" (CT51_DV).
 2. Incarcerated member
 - a. Living Arrangement of type "Incarcerated" (CT165_IC).
 3. Safe at Home
 - a. Safe at Home is identified by a secure PO Box mailing address. The state uses the following four specific PO Boxes for this purpose:
 - i. P.O. Box 1198, Sacramento CA 95812-1198-98-9
 - ii. P.O. Box 1318, Sacramento CA 95812-1318-18-3
 - iii. P.O. Box 1679, Sacramento CA 95812-1679-79-6
 - iv. P.O. Box 2390, Sacramento CA 95812-2390-90-2

Safe at Home is identified when the Current or New address matches one of the PO Boxes and the 5-digit zip code.

PO Box is identified by the address line containing "PO BOX" or "P.O. BOX" or "P O BOX" (case insensitive).

4. Foster Care (FC), Kin-GAP (KG), or Adoption Assistance Program (AAP) program in any status.
- vi. Current and New Address are not a PO Box. PO Box is identified by the address line containing "PO BOX" or "P.O. BOX" or "P O BOX" (case insensitive).
- vii. Recipient is the Primary Applicant on an Active MC program. If the case also has CW (CalWORKs) or CF (CalFresh) programs, then the Primary Applicant should be the same as on the MC program.
 1. Exclude MC programs when any program person is also a program person on a FC, KG, or AAP

programs on the same or any other case. The MC program's Primary Applicant does not have to be on the FC, KG, or AAP case.

2. Exclude MC program Primary Applicants who are Active with a Long Term Care (LTC) aid code in the batch month.
- viii. Recipient has "In the Home" household status. Organizations and Authorized Representatives would not have a household status. These records would not be updated but may get a Task and/or a Journal Entry.
 - ix. A reliable new address is provided when either of the following conditions are true. Refer to "CASS_NCOA_Codes.pdf" supporting document.
 1. When "Category" field is "Return Mail" and "NCOA Move" field code is either:
 - a. "A – Full match." or
 - b. "91 – Matched despite missing secondary number." or
 - c. "92 – Matched despite extra secondary number."
 2. When "Category" field is "Update Recommended" and "CASS Error Code" field is in the range of "9" to "86".
- b. When any of the above conditions in section 2.3.2.2.a to update the address are not met or when conditions in section 2.3.2.2.a are met and is an Inter-County Transfer (ICT) scenario (out of county, out of state, out of country), then create a task. This includes CW or CF cases without a MC program.
 - i. No Tasks will be created when the case has the following conditions:
 1. Safe at Home
 2. FC, KG, or AAP Programs
 3. The recipient is a program person and does not have "In the Home" household status.

Note: Organizations and Authorized Representatives would not have a household status. A Task can be created for them.

- ii. Create a "Return Mail Address Change – In County" task when any of the following are true:
 1. The current mailing "Address County" on the Address Detail page matches the "Mailing Address County" field.
 2. "Mailing Address County" field is blank.
 3. The conditions do not meet the criteria for "Return Mail Address Change – Out of County" task.

Refer to the automated action details in section 2.4 for assignment and due dates.

Use the following program hierarchy to create the task:

1. Recipient is the Primary Applicant and Active as of the batch date on any of the following programs in the respective order
 - a. MC
 - b. CW
 - c. CF
2. The program that the generated document is linked to.
3. Otherwise, the recipient is Active on any of the programs in the default program hierarchy defined in CT18 Program Hierarchy reference table.

Set the long description variables as follows:

1. {1} – “Recipient Name” from the report.
 2. {2} – “NOA/Form Number” from the report.
 3. {3} – “CASS” or “NCOA”.
When the “Category” is “Update Recommended” use CASS values.
When the “Category” is “Return Mail” use NCOA values. If NCOA code is 00 or blank, then use CASS error code values.
 4. {4} – “CASS Error Description Translated (CASS Error Code).” Or “NCOA Move Desc (NCOA Move Code).”
 5. {5} – Current Address
Format using the fields from the report:
“Current Address Line 1”
“Current Address City”, “Current Address State”
“Current Address Zip”
 6. {6} – New Address
Format using the fields from the report:
“New Address Line 1”
“New Address Line 2”
“New Address City”, “New Address State” “New Address Zip”
- iii. Create a “Return Mail Address Change – Out of County” task when any of the following are true:
1. The current mailing “Address County” on the Address Detail page does not match the “Mailing Address County” field.
 2. The “New Address State” field is not CA (California).
 3. The “Domestic” field is not “TRUE” (indicating an international address).

Refer to the automated action details in section 2.4 for assignment and due dates.

Note: When this task is created, then do not create "Return Mail Address Change – In County" task.

Use the following program hierarchy to create the task:

1. Recipient is the Primary Applicant and Active as of the batch date on any of the following programs in the respective order
 - a. MC
 - b. CW
 - c. CF
2. The program that the generated document is linked to.
3. Otherwise, the recipient is Active on any of the programs in the default program hierarchy defined in CT18 Program Hierarchy reference table.

Set the long description variables as follows:

1. {1} – "Recipient Name" from the report.
2. {2} – "NOA/Form Number" from the report.
3. {3} – "CASS" or "NCOA".
When the "Category" is "Update Recommended" use CASS values.
When the "Category" is "Return Mail" use NCOA values. If NCOA code is 00 or blank, then use CASS error code values.
4. {4} – "CASS Error Description Translated (CASS Error Code)." Or "NCOA Move Desc (NCOA Move Code)."
5. {5} – Current Address
Format using the fields from the report:
"Current Address Line 1"
"Current Address City", "Current Address State"
"Current Address Zip"
6. {6} – New Address
Format using the fields from the report:
"New Address Line 1"
"New Address Line 2"
"New Address City", "New Address State" "New Address Zip"

- c. Create a Journal Entry with the details from the report when the address is not updated. Refer to section 2.3.2.4 for the journal details.
 - i. No Journal Entry will be created when the case has the following conditions:

1. Safe at Home
 2. FC, KG, or AAP Programs
 3. A record cannot be matched to the document and a case in CalSAWS.
- d. Skip the record when any of the following conditions are true. No updates will be made and no task or journal will be created.
- i. When a record in the report cannot be matched to a record in CalSAWS. For example, the county code, case number, correspondence ID, or the name do not match a record in CalSAWS. The conditions for a match are in section 2.3.2.2.a.i.
 - ii. When the case is Safe at Home. (Defined in section 2.3.2.2.a.v.3)
 - iii. When the case has FC, KG, or APP Programs. (Defined in section 2.3.2.2.a.v.4)
 - iv. The "New Address Line 1" field is "Corrected address not available", "CASS Error Code" field is in "0"- "8" range, and "NCOA Move Code" field is "00".
3. Update the recipient's address. Refer to "Address_Update_Rules.xlsx" supporting document. When all the conditions in section 2.3.2.2.a are met and the "Current Address State" field value matches the "New Address State" field value, then do the following:
- a. Update the Mailing address with the New Address for the MC program Primary Applicant and update the Physical address if they are the same as the Mailing address.

| Address update field mapping | | |
|------------------------------|-----------------|--|
| Return Mail Report | ADDR | Description |
| New Address Line 1 | LINE_1_ADDR | |
| New Address Line 2 | LINE_2_ADDR | |
| New Address City | CITY_NAME | |
| New Address State | STATE_CODE | |
| New Address Zip | ZIP_CODE_NUM | Zip code format is #####-####. Store the first 5 characters. |
| New Address Zip | ZIP_CODE_SUFFIX | Zip code format is #####-####. Store the last 4 characters. |

| | | |
|------------------------|-------------|--|
| Mailing Address County | COUNTY_CODE | Use CT15 to encode. |
| | BEG_DATE | Use batch date as the effective date. Note: Use effective dating logic to ensure continuous dates. |

- b. If another program person is on the same MC, CW or CF programs as the Primary Applicant (that was updated), that is "In the Home" and has the same Mailing address as the Primary Applicant, then update the Mailing address. Update the Physical address if it is the same as the Mailing address. Set the begin dates the same as described above for the Primary Applicant.

Note: If the Primary Applicant's address is not updated, then the other program persons would also not be updated.

- c. When any program person is not "In the Home", then their address will not be updated, and no task will be created, only a Journal Entry will be created (refer to section 2.3.2.4).
- d. Create a "Address Changed: Review to Send Out CW2200 or appropriate form" task when the Primary Applicant is also Active on CW, CF, or GA/GR programs as of the batch date.
 - i. Use the following program hierarchy to create the task:
 1. CW
 2. CF
 3. GA/GR

Note: GA/GR refers to all types of general relief programs such as GA/GR Automated Solution, General Assistance/General Relief, General Assistance (Managed), General Assistance (Non-Managed).

- e. Create a "Address Changed: Resend Undeliverable NOA/Form(s)" task when the address update is made for at least one person.
 - i. Use the following program hierarchy to create the task:
 1. Recipient is the Primary Applicant and Active as of the batch date on any of the following programs in the respective order
 - a. MC
 - b. CW
 - c. CF
 2. The program that the generated document is linked to.

3. Otherwise, the recipient is Active on any of the programs in the default program hierarchy defined in CT18 Program Hierarchy reference table.

- f. Create a Journal Entry when the Primary Applicant's address is updated.
 - i. When the "Category" is "Return Mail": If NCOA code is 00 or blank, then use CASS error code values for {ErrorCode} and {Description}.

| Journal Entry: Return Mail Report - Address Updated | |
|---|---|
| New/Update | New |
| Long Description | On {BatchDate}, USPS reported form/letter/notice {Form} mailed to {Recipient} on {FormDate} to address {CurrentAddress} will be returned as undeliverable ({ErrorCode}: {Description}). Address was updated to: {NewAddress} |
| Short Description | Return Mail Report - Address Updated |
| Journal Category | Interfaces |
| Journal Type | Change Reported |
| Change Types | Address |

- ii. When the "Category" is "Update Recommended":

| Journal Entry: Return Mail Report - Address Updated | |
|---|--|
| New/Update | New |
| Long Description | On {BatchDate}, USPS reported an address update recommendation for form/letter/notice {Form} mailed to {Recipient} on {FormDate} to address {CurrentAddress} ({ErrorCode}: {Description}). Address was updated to: {NewAddress} |
| Short Description | Return Mail Report - Address Updated |
| Journal Category | Interfaces |
| Journal Type | Change Reported |

| | |
|--------------|---------|
| Change Types | Address |
|--------------|---------|

Note:

Date format: mm/dd/yyyy

Recipient Name format: FirstName MidName(initial) LastName Suffix or Organization Name.

Address format: Street Address, City, State, Zip-ZipSuffix

4. Create a Journal Entry for the case when the address was not updated and section 2.3.2.2.c conditions are met. Refer to "Address_Update_Rules.xlsx" supporting document.
 - a. When the "Category" is "Return Mail" without a new address ("New Address Line 1" is "Corrected address not available"). Use NCOA codes and descriptions. If NCOA code is 00 or blank, then use CASS error code values for {ErrorCode} and {Description}.

| Journal Entry: Return Mail Report – USPS Return Mail | |
|--|---|
| New/Update | New |
| Long Description | On {BatchDate}, USPS reported form/letter/notice {Form} mailed to {Recipient} on {FormDate} to address {CurrentAddress} will be returned as undeliverable ({ErrorCode}: {Description}). |
| Short Description | Return Mail Report - USPS Return Mail |
| Journal Category | Interfaces |
| Journal Type | Change Reported |
| Change Types | Address |

- b. When the "Category" is "Return Mail" with a new address. Use NCOA codes and descriptions. If NCOA code is 00 or blank, then use CASS error code values for {ErrorCode} and {Description}.

| Journal Entry: Return Mail Report – USPS Return Mail | |
|--|---|
| New/Update | New |
| Long Description | On {BatchDate}, USPS reported form/letter/notice {Form} mailed to {Recipient} on {FormDate} to address {CurrentAddress} will be returned as undeliverable ({ErrorCode}: {Description}). The NCOA record |

| | |
|-------------------|---|
| | address (forwarding address) is {NewAddress}. |
| Short Description | Return Mail Report - USPS Return Mail |
| Journal Category | Interfaces |
| Journal Type | Change Reported |
| Change Types | Address |

- c. When the "Category" is "Update Recommended" without a new address ("New Address Line 1" is "Corrected address not available"). Use CASS codes and descriptions.

| Journal Entry: Return Mail Report – USPS Address Update Recommended | |
|--|---|
| New/Update | New |
| Long Description | On {BatchDate}, USPS reported an address update recommendation for {Form} mailed to {Recipient} on {FormDate} to address {CurrentAddress} ({ErrorCode}: {Description}). |
| Short Description | Return Mail Report - USPS Address Update Recommended |
| Journal Category | Interfaces |
| Journal Type | Change Reported |
| Change Types | Address |

- d. When the "Category" is "Update Recommended" with a new address. Use CASS codes and descriptions.

| Journal Entry: Return Mail Report – USPS Address Update Recommended | |
|--|---|
| New/Update | New |
| Long Description | On {BatchDate}, USPS reported an address update recommendation for {Form} mailed to {Recipient} on {FormDate} to address {CurrentAddress} ({ErrorCode}: {Description}). The CASS recommended address is {NewAddress}. |

| | |
|-------------------|--|
| Short Description | Return Mail Report - USPS Address Update Recommended |
| Journal Category | Interfaces |
| Journal Type | Change Reported |
| Change Types | Address |

Note:

Date format: mm/dd/yyyy

Recipient Name format: FirstName MidName(initial) LastName Suffix or Organization Name.

Address format: Street Address, City, State, Zip-ZipSuffix

2.3.3 Partner Integration Testing

Yes – Central Print (Gainwell).

2.3.4 Execution Frequency

Daily Mon-Sat excluding Sunday and Holidays.

2.3.5 Key Scheduling Dependencies

Predecessor: Return Mail Decryption

2.3.6 Counties Impacted

All Counties.

2.3.7 Category

Core.

2.3.8 Data Volume/Performance

Estimated 3,000,000 records per month across the 21 counties that currently participate in the return mail process.

2.3.9 Interface Partner

Central Print (Gainwell)

2.3.10 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

2.4 Automated Actions

2.4.1 Overview

This SCR will add the new Automated Actions:

1. Return Mail Address Change – In County
2. Return Mail Address Change – Out of County
3. Address Changed: Review to Send Out CW2200 or appropriate form
4. Address Changed: Resend Undeliverable NOA/Form(s)

When “Return Mail Address Change – In County” is active, a task will be created when a case has a return mail report that contains an updated address that is within the same county, and the address was unable to be automatically updated by batch.

When “Return Mail Address Change – Out of County” is active, a task will be created when a case has a return mail report that contains an updated address that is outside of the original address's county or out of state.

When “Address Changed: Review to Send Out CW2200 or appropriate form” is active, a task will be created when an address has been automatically updated by batch on a CalFresh, CalWORKs, or GA/GR case. The task will instruct the worker to review the address change and determine if it is necessary to send out a CW2200 the appropriate form.

When “Address Changed: Resend Undeliverable NOA/Form(s)” is active, a task will be created when an address has been automatically updated by batch. The task will instruct the worker to review the address change and determine if it is necessary to send out undeliverable NOAs or Forms.

2.4.2 Automated Action Detail Mockup

Automated Action Detail

[Edit](#)[Close](#)

Action Information

Name:

Return Mail Address Change – In County

Type:

Create Task

Status: *

Inactive

Program(s):

All Programs

Run Date:

Daily (Mon-Sat)

Source:

Batch

Scenario:

A return mail report contained an updated address.

Task Information

Task Type: *

Return Mail Address Change – In County

Due Date:

Default Due Date

Default Due Date:

14 days

Initial Assignment:

Default Assignment

Default Assignment:

Current Program Worker

Sibling Assignment:

No

Long Description:

Message: Undeliverable based on current address

Recipient Name: {1}

NOA/Form Number: {2}

{3} Description/Code: {4}

****Current CalSAWS Address Fields:****

{5}

****New CalSAWS Address Fields:****

{6}

County Instructions: Contact the recipient for the correct address, then update CalSAWS.

[Edit](#)[Close](#)

Figure 2.4.1 – Automated Action: Return Mail Address Change – In County (View Mode)

Automated Action Detail

Save And Return

Cancel

Action Information

Name:

Return Mail Address Change – In County

Type:

Create Task

Status: *

Inactive ▾

Program(s):

All Programs

Run Date:

Daily (Mon-Sat)

Source:

Batch

Scenario:

A return mail report contained an updated address.

Task Information

Task Type: *

Return Mail Address Change – In County ▾

Due Date:

Default Due Date ▾

Default Due Date:

14 days

Initial Assignment:

Default Assignment ▾

Default Assignment:

Current Program Worker

Sibling Assignment:

No ▾

Long Description:

Message: Undeliverable based on current address

Recipient Name: {1}

NOA/Form Number: {2}

{3} Description/Code: {4}

Current CalSAWS Address Fields:

{5}

New CalSAWS Address Fields:

{6}

County Instructions: Contact the recipient for the correct address, then update CalSAWS.

Save And Return

Cancel

Figure 2.4.2 – Automated Action: Return Mail Address Change – In County (Edit Mode)

Automated Action Detail

Edit

Close

Action Information

Name:

Return Mail Address Change – Out of County

Type:

Create Task

Status: *

Inactive

Program(s):

All Programs

Run Date:

Daily (Mon-Sat)

Source:

Batch

Scenario:

A return mail report contained an updated address that is out of county/state.

Task Information

Task Type: *

Return Mail Address Change – Out of County

Due Date:

Default Due Date

Default Due Date:

14 days

Initial Assignment:

Default Assignment

Default Assignment:

Current Program Worker

Sibling Assignment:

No

Long Description:

Message: Undeliverable based on current address

Recipient Name: {1}

NOA/Form Number: {2}

{3} Description/Code: {4}

Current CalSAWS Address Fields:

{5}

New CalSAWS Address Fields:

{6}

County Instructions: Initiate ICT if out of county/take appropriate action if out of state.

Edit

Close

Figure 2.4.3 – Automated Action: Return Mail Address Change – Out of County (View Mode)

Automated Action Detail

Save And Return
Cancel

Action Information

| | | |
|--|-------------------------------------|---|
| Name: Return Mail Address Change – Out of County | Type: Create Task | Status: * Inactive ▾ |
| Program(s): All Programs | Run Date: Daily (Mon-Sat) | Source: Batch |
| Scenario: A return mail report contained an updated address that is out of county/state. | | |

Task Information

Task Type: *
Return Mail Address Change – Out of County ▾

| | |
|---|--|
| Due Date: Default Due Date ▾ | Default Due Date: 14 days |
| Initial Assignment: Default Assignment ▾ | Default Assignment: Current Program Worker |
| Sibling Assignment: No ▾ | |

Long Description:
 Message: Undeliverable based on current address

Recipient Name: {1}
 NOA/Form Number: {2}
 {3} Description/Code: {4}

****Current CalSAWS Address Fields:****
 {5}

****New CalSAWS Address Fields:****
 {6}

County Instructions: Initiate ICT if out of county/take appropriate action if out of state.

Save And Return
Cancel

Figure 2.4.4 – Automated Action: Return Mail Address Change – Out of County (Edit Mode)

Automated Action Detail

Edit Close

Action Information

| | | |
|--|-------------------------------------|------------------------------|
| Name: Address Changed: Review to Send Out CW2200 or appropriate form | Type: Create Task | Status: * Inactive |
| Program(s): CF, CW, GA/GR | Run Date: Daily (Mon-Sat) | Source: Batch |
| Scenario: Batch has automatically changed the address of a case with a CalWORKs, CalFresh, or GA/GR program. | | |

Task Information

| | |
|---|--|
| Task Type: * Address Changed: Review to Send Out Forms | |
| Due Date: Default Due Date | Default Due Date: 7 days |
| Initial Assignment: Default Assignment | Default Assignment: Current Program Worker |
| Sibling Assignment: No | |
| Long Description: Review the address update and determine if a CW2200 or other appropriate form should be sent. | |

Edit Close

Figure 2.4.5 – Automated Action: Address Changed: Review to Send Out CW2200 or appropriate form (View Mode)

Automated Action Detail

Save And Return

Cancel

Action Information

Name:

Address Changed: Review to Send Out CW2200 or appropriate form

Type:

Create Task

Status: *

Inactive ▾

Program(s):

CF, CW, GA/GR

Run Date:

Daily (Mon-Sat)

Source:

Batch

Scenario:

Batch has automatically changed the address of a case with a CalWORKs, CalFresh, or GA/GR program.

Task Information

Task Type: *

Address Changed: Review to Send Out Forms ▾

Due Date:

Default Due Date ▾

Default Due Date:

7 days

Initial Assignment:

Default Assignment ▾

Default Assignment:

Current Program Worker

Sibling Assignment:

No ▾

Long Description:

Review the address update and determine if a CW2200 or other appropriate form should be sent.

Save And Return

Cancel

Figure 2.4.6 – Automated Action: Address Changed: Review to Send Out CW2200 or appropriate form (Edit Mode)

Automated Action Detail

Edit

Close

Action Information

Name:

Address Changed: Resend Undeliverable NOA/Form(s)

Type:

Create Task

Status: *

Inactive

Program(s):

All Programs

Run Date:

Daily(Mon-Sat)

Source:

Batch

Scenario:

Batch has automatically updated the address with a new address that was provided in the return mail report.

Task Information

Task Type: *

Due Date:

Default Due Date

Default Due Date:

14 days

Initial Assignment:

Default Assignment

Default Assignment:

Current Program Worker

Sibling Assignment:

No

Long Description:

Mailing address updated. Resend the undeliverable NOA/Form(s).

Recipient Name: {1}

NOA/Form Number: {2}

Edit

Close

Figure 2.4.7 – Automated Action: Address Changed: Resend Undeliverable NOA/Form(s) (View Mode)

Automated Action Detail

Action Information

| | | |
|---|------------------------------------|--------------------------------|
| Name: Address Changed: Resend Undeliverable NOA/Form(s) | Type: Create Task | Status: * Inactive ▾ |
| Program(s): All Programs | Run Date: Daily(Mon-Sat) | Source: Batch |
| Scenario: Batch has automatically updated the address with a new address that was provided in the return mail report. | | |

Task Information

Task Type: *

| | |
|---|--|
| Due Date: <input type="text" value="Default Due Date"/> | Default Due Date: 14 days |
| Initial Assignment: <input type="text" value="Default Assignment"/> | Default Assignment: Current Program Worker |
| Sibling Assignment: <input type="text" value="No"/> | |

Long Description:
Mailing address updated. Resend the undeliverable NOA/Form(s).

Recipient Name: {1}
NOA/Form Number: {2}

Figure 2.4.8 – Automated Action: Address Changed: Resend Undeliverable NOA/Form(s) (Edit Mode)

2.4.3 Description of Changes

1. Add the new Automated Action “Return Mail Address Change – In County”.
 - a. Action Information
 - i. Name: Return Mail Address Change – In County
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): All Programs
 - v. Run Date: Daily (Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A return mail report contained an updated address.
 - b. Task Information
 - i. Task Type: Return Mail Address Change – In County
NOTE: Task Type will be customizable by the counties.
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 14 days

- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Sibling Assignment: No
- viii. Long Description:
Message: Undeliverable based on current address

Recipient Name: {1}
 NOA/Form Number: {2}
 {3} Description/Code: {4}

****Current CalSAWS Address Fields:****
 {5}

****New CalSAWS Address Fields:****
 {6}

County Instructions: Contact the recipient for the correct address, then update CalSAWS.

Note: This task is specific to the Return Mail functionality. The NCOA effort (SCR CA- 286076) will have a different task.

Parameter Descriptions:

- {1} – Recipient Name.
- {2} – Form Name.
- {3} – CASS or NCOA.
- {4} – CASS/NCOA description followed by code value.
- {5} – Current address provided in the report.
- {6} – New address provided in the report.

2. Add the new Automated Action "Return Mail Address Change – Out of County".
 - a. Action Information
 - i. Name: Return Mail Address Change – Out of County
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): All Programs
 - v. Run Date: Daily (Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A return mail report contained an updated address that is out of county/state.
 - b. Task Information
 - i. Task Type: Return Mail Address Change – Out of County
NOTE: Task Type will be customizable by the counties.
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 14 days
 - v. Initial Assignment: Default Assignment

- vi. Default Assignment: Current Program Worker
- vii. Sibling Assignment: No
- viii. Long Description:
 - Message: Undeliverable based on current address

Recipient Name: {1}
 NOA/Form Number: {2}
 {3} Description/Code: {4}

****Current CalSAWS Address Fields:****
 {5}

****New CalSAWS Address Fields:****
 {6}

County Instructions: Initiate ICT if out of county/take appropriate action if out of state.

Note: This task is specific to the Return Mail functionality. The NCOA effort (SCR CA- 286076) will have a different task.

Parameter Descriptions:

- {1} – Recipient Name.
- {2} – Form Name.
- {3} – CASS or NCOA.
- {4} – CASS/NCOA description followed by code value.
- {5} – Current address provided in the report.
- {6} – New address provided in the report.

3. Add the new Automated Action "Address Changed: Review to Send Out CW2200 or appropriate form".
 - a. Action Information
 - i. Name: Address Changed: Review to Send Out CW2200 or appropriate form
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CF, CW, GA/GR
 - v. Run Date: Daily (Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: Batch has automatically changed the address of a case with a CalWORKs, CalFresh, or GA/GR program.
 - b. Task Information
 - i. Task Type: Address Changed: Review to Send Out Forms
NOTE: Task Type will be customizable by the counties.
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 7 days
 - v. Initial Assignment: Default Assignment

- vi. Default Assignment: Current Program Worker
- vii. Sibling Assignment: No
- viii. Long Description: Review the address update and determine if a CW2200 or other appropriate form should be sent.

4. Add the new Automated Action "Address Changed: Resend Undeliverable NOA/Form(s)".

a. Action Information

- i. Name: Address Changed: Resend Undeliverable NOA/Form(s)
- ii. Type: Create Task
- iii. Status: Inactive
- iv. Program(s): All Programs
- v. Run Date: Daily (Mon-Sat)
- vi. Source: Batch
- vii. Scenario: Batch has automatically updated the address with a new address that was provided in the return mail report.

b. Task Information

- i. Task Type: BLANK
- ii. Task Sub-Type: BLANK
- iii. Due Date: Default Due Date
- iv. Default Due Date: 14 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Sibling Assignment: No
- viii. Long Description: Mailing address updated. Resend the undeliverable NOA/Form(s).

Recipient Name: {1}
NOA/Form Number: {2}

Parameter Descriptions:
{1} – Recipient Name.
{2} – Form Name.

2.4.4 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Accessibility

The Automated Action should be assessed for accessibility requirements to meet Accessibility Standards.

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 Task Types

2.5.1 Overview

This section outlines the modifications required to support the new Task Types:

1. Return Mail Address Change – In County
2. Return Mail Address Change – Out of County
3. Address Changed: Review to Send Out Forms

These Task Types will be used by the new Automated Actions:

1. Return Mail Address Change – In County
2. Return Mail Address Change – Out of County
3. Address Changed: Review to Send Out CW2200 or appropriate form

2.5.2 Task Type Detail Mockup

Task Type Detail

*- Indicates required fields Edit Close

Task Type Information

| | | |
|--|---|--------------------------|
| Name: * Return Mail Address Change – In County | Category: * Mail Address Change | Priority: High |
| Available Online: No | Available for Automation: Yes | |
| Instructions: | | |
| Expire Tasks: * No | | |
| Newly Assigned Indicator: * Tasks display indicator for 5 day(s) | | |

Sub-Type Information

| Name | Available Online | Available for Automation | Priority | Task Expiration |
|---------------|------------------|--------------------------|----------|-----------------|
| No Data Found | | | | |

Append Information

Action Step Information

Resulting Task Information

Staff Classification Information

Edit Close

Figure 2.5.1 – Task Type: Return Mail Address Change – In County

Task Type Detail

* - Indicates required fields

Edit Close

Task Type Information

| | | |
|--|---|--------------------------|
| Name: * Return Mail Address Change – Out of County | Category: * Mail Address Change | Priority: High |
| Available Online: No | Available for Automation: Yes | |
| Instructions: | | |
| Expire Tasks: * No | | |
| Newly Assigned Indicator: * Tasks display indicator for 5 day(s) | | |

Sub-Type Information

| Name | Available Online | Available for Automation | Priority | Task Expiration |
|---------------|------------------|--------------------------|----------|-----------------|
| No Data Found | | | | |

Append Information

Action Step Information

Resulting Task Information

Staff Classification Information

Edit Close

Figure 2.5.2 – Task Type: Return Mail Address Change – Out of County

Task Type Detail

* - Indicates required fields

Edit Close

Task Type Information

Name: *
Address Changed: Review to Send Out Forms

Category: *
Mail Address Change

Priority:
High

Available Online:
No

Available for Automation:
Yes

Instructions:

Expire Tasks: *
No

Newly Assigned Indicator: *
Tasks display indicator for 5 day(s)

▼ **Sub-Type Information**

| Name | Available Online | Available for Automation | Priority | Task Expiration |
|---------------|------------------|--------------------------|----------|-----------------|
| No Data Found | | | | |

▶ **Append Information**

▶ **Action Step Information**

▶ **Resulting Task Information**

▶ **Staff Classification Information**

Edit Close

Figure 2.5.3 – Task Type: Address Changed: Review to Send Out Forms

2.5.3 Description of Changes

1. Add the Task Type “Return Mail Address Change – In County”
 - a. Task Type Information
 - i. Name: Return Mail Address Change – In County
 - ii. Category: Mail Address Change
 - iii. Priority: High
 - iv. Available Online: No
 - v. Available for Automation: Yes
 - vi. Instructions: [blank]
 - vii. Expire tasks: No

- viii. New Assigned Indicator: Tasks display indicator for 5 day(s)
 - b. Editable by counties.**
 - c. This Task Type will be used by the "Return Mail Address Change – In County" Automated Action defined in section 2.4.
- 2. Add the Task Type "Return Mail Address Change – Out of County".
 - a. Task Type Information
 - i. Name: Return Mail Address Change – Out of County
 - ii. Category: Mail Address Change
 - iii. Priority: High
 - iv. Available Online: No
 - v. Available for Automation: Yes
 - vi. Instructions: [blank]
 - vii. Expire Tasks: No
 - viii. New Assigned Indicator: Task display indicator for 5 day(s)
 - b. Editable by counties.**
 - c. This Task Type will be used by the "Return Mail Address Change – Out of County" defined in section 2.4.
- 3. Add the Task Type "Address Changed: Review to Send Out Forms"
 - a. Task Type Information
 - i. Name: Address Changed: Review to Send Out Forms
 - ii. Category: Mail Address Change
 - iii. Priority: High
 - iv. Available Online: No
 - v. Available for Automation: Yes
 - vi. Instructions: [blank]
 - vii. Expire Tasks: No
 - viii. New Assigned Indicator: Tasks display indicator for 5 day(s)
 - b. Editable by counties.**
 - c. This Task Type will be used by the "Address Changed: Review to Send Out CW2200 or appropriate form" Automated Action defined in section 2.4.

2.5.4 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Task Types

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Accessibility

The Task Types should be assessed for accessibility requirements to meet Accessibility Standards.

2.5.8 Page Usage/Data Volume Impacts

N/A

2.6 Task Category – Mail Address Change

2.6.1 Overview

This section outlines the modifications required to support a new Task Category in the CalSAWS System.

2.6.2 Task Category Detail Mockup

The screenshot shows a 'Task Category Detail' form. At the top left, there is a legend: '* - Indicates required fields'. To the right are 'Edit' and 'Close' buttons. The form is divided into two main sections: 'Task Category Information' and 'Associations'.
The 'Task Category Information' section contains:
- 'Name: *' with the value 'Mail Address Change'.
- 'Description:' which is currently empty.
The 'Associations' section contains a table of counts:
- Position(s): 0
- Bank(s): 0
- Task Type(s): 3 (with a small red icon)
- Task Reassignment(s): 0
- QA/QC Task Sample(s): 0
At the bottom right of the form, there are 'Edit' and 'Close' buttons.

Figure 2.6.1 – Task Category: Mail Address Change

2.6.3 Description of Changes

1. Add the system Task Category "Mail Address Change".
 - a. Name: Mail Address Change
 - b. Description: (null)
2. Task Category editable by counties.
3. This Task Category will be used by the "Return Mail Address Change – Out of County", "Return Mail Address Change – In County", and "Address Changed: Review to Send Out Forms" Task Types defined in section 2.5.

2.6.4 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Task Categories

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Accessibility

The Task Category should be assessed for accessibility requirements to meet Accessibility Standards.

2.6.8 Page Usage/Data Volume Impacts

N/A

2.7 Eligibility Rules Updates – No Impact

2.8 eHIT – No Impact

2.9 Notification of Mailing Address Update Form

2.9.1 Overview

This form will be sent to members to notify them regarding their address change due to information received by a third-party reliable source. Medi-Cal members are not required to respond to the notice as the notice is only informing the member of the address update, and the county does not require any more information to determine ongoing eligibility. If the member does not contact the county to confirm or correct the newly updated in-state address, the address remains in effect and future correspondence will be sent to that address. Additionally, the county must send the previously undeliverable mail to the member at the new address.

Non State Form: CSF 82

Programs: Medical (MAGI/Non-MAGI)

Attached Forms: N/A

Forms Category: Form

Template Repository Visibility: All Counties

Languages: English, Spanish

2.9.2 Form/NOA Verbiage

Form Header: Header_1

State Flag: 4

Form Title (Document List Page Displayed Name): Notification of Mailing Address Update

Form Number: CSF 82

Include NA Back 9: N

- **Includes standard NA Back 9 variable population:** N/A

Imaging Form Name: N/A

Imaging Document Type: N/A

Imaging Case/Person: N/A

Form Mockups/Examples: See Supporting Documents # 1

2.9.3 Form/NOA Variable Population

The following variables will be populated on the Notification of Mailing Address update. Addresses will be populated on the form with the standard formatting that all CalSAWS forms use.

| Variable Name | Population | POPULATION SCENARIOS |
|---------------------------|---|--|
| <Date> | Populate with current date. | <p>Template Repository: This will not auto populate from Template Repository</p> <p>Batch: This will auto populate by Batch.</p> |
| <Person Name> | <p>Populate Primary Applicants name that had a change in address.</p> <p>Populate with the selected persons name when generated from Template Repository.</p> <p>Ex: John Doe</p> | <p>Template Repository: This will auto populate from Template Repository</p> <p>Batch: This will auto populate by Batch.</p> |
| <Updated Mailing Address> | Populate the Primary Applicant new mailing address. | <p>Template Repository: This will not auto populate from Template Repository</p> <p>Batch: This will auto populate by Batch.</p> |
| <In-Person Address> | Populate Medical Program local County In-Person Address | <p>Template Repository: This will not auto populate from Template Repository</p> <p>Batch: This will auto populate by Batch.</p> |
| <By Mail Address> | Populate Medical Program local County Mailing Address | <p>Template Repository: This will not auto populate from Template Repository</p> <p>Batch: This will auto populate by Batch.</p> |

* Note: All Form Body Variables will be editable by default. When generating a Blank Form from Template Repository the field will be editable unless otherwise indicated

Variables Requiring Translations: N/A

Notification of Mailing Address Update

County information

Customer address

Date: <Date>

Dear <Person Name>

We are writing to inform you that your mailing address has been updated in our records. This change was based on information that we received from reliable sources, such as the United States Postal Service's National Change of Address system, or your Medi-Cal Managed Health Care Plan. We use these sources to confirm information and keep you informed about your Medi-Cal. Please check your contact information below.

Updated Mailing Address on File:

<Updated Mailing Address>

If this address is correct, you don't need to do anything.

If this address is not correct, update it as soon as possible using the options below. Updating your contact information ensures you don't miss any important information about your Medi-Cal. We have provided a list of ways below.

Ways to Update Your Address:

- **Online:** You can update your address online at www.benefitscal.com
- **In-Person or By Mail:** You can update your address in-person at your local county office, or you can update your address by mail via the address below:

In Person:

<In-Person Address>

By Mail:

<By Mail Address>

- **By Phone:** You can update your address by phone using the number located at the top of this letter.

2.9.4 Form/NOA Generation Conditions

1. **Add Form Sweep Generation Conditions**

A. **Description of Changes**

- i. Create a new batch job that will pick up all records from the interface detailed in 2.3.
 - 1. From the following records pulled from the interface use the following filters:
 - a. Primary Applicant is active.
 - b. Medi-Cal Program is active.
 - c. Program is Medi-Cal

Note: Form will only be generated once per program and sent to the primary applicant.

Technical Note: When the above conditions are true, insert records into sys_transact table.

B. **Execution Frequency**

- i. This batch runs Daily.

C. **Key Scheduling Dependencies**

- i. The PO00EM430 streams job will run after this batch job, and PO00EM431 consumer batch jobs will run after the stream job and is responsible for generating the form.
- ii. This Job should run after the batch job that is defined in 2.7.

D. **Counties Impacted**

- i. All Counties

Required Form Input: N/A

2. **Add Form to Template Repository**

Add Notification of Mailing Address Update Form to the Template Repository

Required Document Parameters: No additional parameters apart from the standard

3. **Add Form Control**

Due Date: N/A

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

4. **Add Form Print Options and Mailing Requirements**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local |
|----------------|--------------------------|----------------------|------------------------|---------------|
| Y | Y | Y | Y | Y |

Mailing Requirements:

Mail-To (Recipient): Primary Applicant

Mailed From (Return): Medical Program Local County Office

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N

Electronic Signature: N

Electronic Signature (IVR/Text): N

Check to Sign: N

Post to Self Service Portal (SSP): Y





2.10 Report Name – No Impact

2.11 Data Warehouse Name – No Impact

2.12 Data Change – No Impact

2.13 Automated Regression Test – No Impact

3 SUPPORTING DOCUMENTS

| NUMBER | FUNCTIONAL AREA | DESCRIPTION | ATTACHMENT |
|--------|--------------------|--------------------------------|---|
| 1 | Correspondence | Mock Up | Address Update Notification Notice  Address_Update_Notification_Notice_1.doc |
| 2 | Batch & Interfaces | Address Update Rules |  Address_Update_Rules.xlsx |
| 3 | Batch & Interfaces | Return Mail Report File Layout |  CA-293533_File_Layout_CR3.xlsx |
| 4 | Batch & Interfaces | CASS NCOA Codes |  CASS_NCOA_Codes.pdf |

The following form will use the CalSAWS Standard Header that includes Date, Case Name, Case Number, Worker Name, Worker Id, and Worker Phone number.

4 OUTREACH

N/A

4.1 Lists

N/A

5 APPENDIX

N/A