## Reports and their conditions: Need Andrew’s final approval

## Andy’s comments follow the “From Andy>>” marking - - ->

**Each of the reports now indicates the columns to be included in the associated reports.**

Background for Data Fields:

**AgencyId**: This represents agency against which complaint is being filed

**IsViewedByOwner** represents Owner has seen this record after Agency has submitted its response

**CreatedBy**: This is UniqueIdentifier of the userId of the person who created the complaint record. From this we know who created this record - by Owner or by Agency themselves

1. **Report: New Complaint Requiring Action:** Here Owner has submitted complaints and now Agency needs to see them for the first time.

**Where conditions**:

AgencyId: Loggedin AgencyId (Not needed if Owner is logging in as he can see all Agency data)

Submitted Complaint to Agency is Yes

Submitted Complaint to Agency Date is within last 30 days (Andrew, we need you to confirm this)

From Andy>> Do not need the “30 day” date parameter here….if it has been submitted to the Agency and the Agency has NOT opened this record, then it should stay in this status until the Agency actually opens the record [perhaps something like a “IsViewedByAgency” flag]

THEREFORE - - IsViewedByAgency = 0 (meaning “No”)

CreatedBy is userId of Role Owner (This shows that it was created By user of Owner type)

Submitted Complaint to Owner is No

**REPORT COLUMNS to include (from left to right):**

* Complaint ID
* PIMS Account #
* Last Name
* First Name
* Last 4 SSN
* Complaint Date
* Column for “View Details . . .”

1. **Report: New Complaint in Progress:** Agency have them and it is in progress..

**Where conditions**:

AgencyId: Loggedin AgencyId (Not needed if Owner is logging in as he can see all Agency data)

Submitted Complaint to Agency Date is NOT null

Submitted Complaint to Owner is No

Submitted Complaint to Owner Date is Null

From Andy>> IsViewedByAgency = 1 (meaning “Yes”)

**REPORT COLUMNS to include (from left to right):**

* Complaint ID
* PIMS Account #
* Last Name
* First Name
* Last 4 SSN
* Complaint Date
* Column for “View Details . . .”

**NOTE**: I realize that the columns are the same on this report as on the “New Complaint Requiring Action” report. However, the big difference is that with THIS report, the Agency has at least STARTED to look at this and done something on the complaint. The other report shows those complaints that have not even been LOOKED AT yet by the Agency.

1. **Report: Awaiting Additional Information:** Agency have them and they are awaiting for an additional information.

**Where conditions**:

AgencyId: Loggedin AgencyId (Not needed if Owner is logging in as he can see all Agency data)

Submitted Complaint to Agency Date is NOT null

Submitted Complaint to Owner is No

Submitted Complaint to Owner Date is Null

Need More info from Debtor is Yes

Need More info from Debtor Date is within last 30 days

From Andy>> Do not need the “30 day” date parameter here…we absolutely want to know how long it takes for the debtor to get back to the Agency which sometimes may be longer than 30 days

**REPORT COLUMNS to include (from left to right):**

* Complaint ID
* PIMS Account #
* Last Name
* First Name
* Last 4 SSN
* Complaint Date
* Date Info Requested [this is the title of the column, the data for the column would come from the field “Date Requested” as shown on the mockup]
* Column for “View Details . . .”

1. **Report: Submitted for Owner Action:** Agency have submitted them for owner action.

**Where conditions**:

AgencyId: Loggedin AgencyId (Not needed if Owner is logging in as he can see all Agency data)

Submitted Complaint to Owner is Yes

Submitted Complaint to Owner Date is within last 30 days

From Andy>> Do not need the “30 day” date parameter here….if it has been submitted to the Owner and the Owner has NOT opened this record, then it should stay in this status until the Owner actually opens the record

IsViewdByOwner is 0 – Just submitted to Owner has not viewed it.

**REPORT COLUMNS to include (from left to right):**

* Complaint ID
* PIMS Account #
* Last Name
* First Name
* Last 4 SSN
* Complaint Date
* Submitted to Owner [this is the title of the column, the data for the column would come from the field “Date Submitted” under the “Debt Owner Process” on the mockup
* Column for “View Details . . .”

1. **Report: Owner Response is in Progress:** Owner has viewed it but no response yet

**Where conditions**:

AgencyId: Loggedin AgencyId (Not needed if Owner is logging in as he can see all Agency data)

Submitted Complaint to Owner is Yes

Submitted Complaint to Owner Date is within last 30 days

From Andy>> Do not need the “30 day” date parameter here….if it has been submitted to the Owner and the Owner is working this but has NOT completed their work to send it back to the Agency, then it should stay in this status until the Owner actually completes their work

IsViewdByOwner is 1 – Owner has viewed it

**REPORT COLUMNS to include (from left to right):**

* Complaint ID
* PIMS Account #
* Last Name
* First Name
* Last 4 SSN
* Submitted to Owner [this is the title of the column, the data for the column would come from the field “Date Submitted” under the “Debt Owner Process” on the mockup
* Column for “View Details . . .”

**NOTE**: I realize that the columns are the same on this report as on the “Submitted for Owner Action” report. However, the big difference is that with THIS report, the Owner has at least STARTED to look at this and done something on the complaint. The other report shows those complaints that have not even been LOOKED AT yet by the Owner.

1. **Report: Resolved Complaint:** Resolved cases

**Where conditions**:

AgencyId: Loggedin AgencyId (Not needed if Owner is logging in as he can see all Agency data)

Debtor Agree is Yes

Final Action Steps is not null

**REPORT COLUMNS to include (from left to right):**

* Complaint ID
* PIMS Account #
* Last Name
* First Name
* Last 4 SSN
* Complaint Date
* Date Resolved [this is the title of the column, the data for the column would come from the “Agency Response to Debtor Date” field at the bottom of the mockup
* Response Time (Days) [this is the title of the column, the data from the column would come from the “Total Response Time” field at the bottom of the mockup
* Column for “View Details . . .”