Epic: Medallion

Target release	V 1.0
Epic	Medallion
Document status	DRAFT
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QA	

🎯 Objective 🔗

Medallions are the core of the business of Big Apple's Taxi (BAT) Management. Medallions are to be placed on vehicles and hacked up for the vehicle to be authorized as a taxi by TLC. Medallions are leased from Medallion Owners.

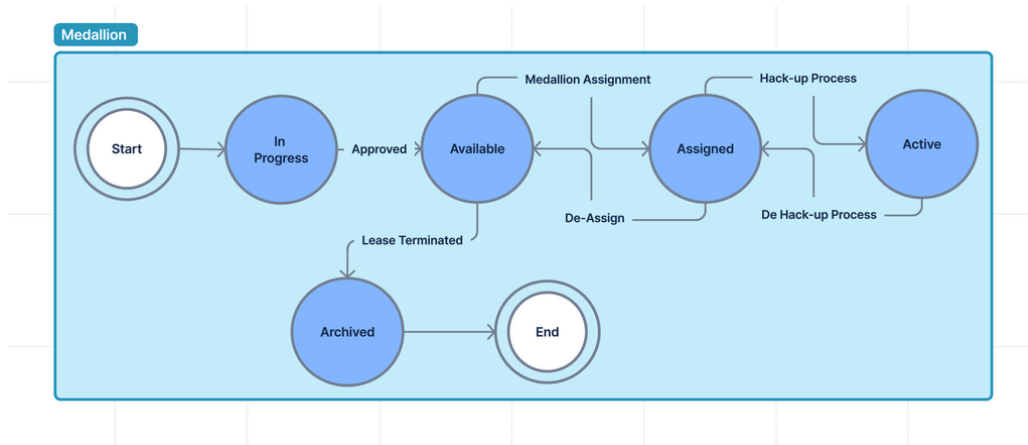***Medallion Owners:*** The Medallion Owners could be

a. Individuals

b. Corporations or LLCs

Corporations or LLCs exist within Entities. A Corporation or a LLC could hold a maximum of 3 medallions while an individual could hold a max of only 1 medallion.

BAT manages the medallion while it is leased to them. As part of managing the medallion, BAT can

· Update the Payee for the Royalty fee

· Update the Medallion Owner address

· Send the Medallion to Storage

· Retrieve the Medallion from Storage

· Renew the Medallion with TLC when renewal is due

· Assign the Medallion to a Vehicle

· De-assign the medallion from a Vehicle

· Terminate the Medallion Lease and send the Medallion back to the Medallion Owner

⚙ Medallion States and Operations 🔗

A medallion can be in one of the following states:

1. ***In Progress (I):*** Till the Royalty Fee Contract is signed and the medallion is available, a medallion will be in progress. This indicates that the New Medallion case is not yet closed and is in progress.

2. ***Available (A):*** the medallion is available with Big Apple and can be assigned to a vehicle for hack-up. Before the assignment to a vehicle and after a de-hackup, the medallion will be in the available state. While in the available state, the medallion could be sent for storage as it is not assigned for a vehicle yet. While a medallion is in storage, BATM need not pay the management fee to all the medallion owners. Only the owners of the medallions that are active are paid the management fee by default. Certain owners are exempted from this and will be indicated in the medallion lease screen.

3. ***Assigned to a Vehicle (V):*** The medallion is assigned to a vehicle, and the vehicle is yet to be hacked up to be on the road. Once the vehicles with active medallions are de-hacked, the medallion returns to this state.

4. ***Active (Y):*** the medallion is assigned to a vehicle, hacked up and on the road.

5. ***Archived (N):*** the medallion is not active and also not with the BAT management. Hence, archived. The medallion could be sent to storage and then the owner would retrieve it from storage as well.

Medallion Storage and Retrieval: A medallion could be sent to storage in the available and archived states. Hence, Storage is a flag (Y or N) and not a state. A stored medallion could be retrieved if it is not archived.

Medallion Current State	Listed in Manage Medallions	Assign Vehicle	Store Medallion	Retrieve Medallion	View Vehicles	View Drivers
In Progress	No	NA	NA	NA	NA	NA
Available	Yes	Yes	Yes (If not stored)	Yes (If stored)	Yes	NA
Assigned	Yes	No	No	No	Yes	NA
Active	Yes	No	No	No	Yes	Yes
Archived	Yes	No	Yes (If not stored)	Yes (If stored)	Yes	Yes

Business Rules 🔗

1. Medallion numbers are unique and are represented as 9X99.

2. A medallion renewal will be valid for 2 years from the renewal start date.

3. An individual can hold only 1 medallion.

4. A Corporation or LLC can hold up to 3 medallions.

5. An Entity consists of multiple corporations/LLCs. However, an entity cannot hold medallions directly.

6. The owners for an entity or a corporation are individuals. So, a medallion owner could be an individual or a corporation/LLC, however, the owners of the corporation/LLC are always individuals.

7. A Corporation consists of a President, Secretary and Corporate Member. A LLC consists of a Manager and a Member.

8. There are two types of Medallions: Regular and WAV.

9. The Medallion Type determines the type of vehicle (Regular or WAV) in which the medallion can be used.

📊 Success metrics 🔗

Goal	Metric
A new medallion with a unique Medallion Number can be created.	Customer Experience
A Royalty Fee Contract can be generated and stored for a Medallion as per the Medallion Owner Type (Individual , Corporation or LLC) and Medallion Info entered.	Regulatory Compliance, Operational Efficiency
A Management Fee for the Medallion can be stored and payments can be made to the Medallion Owner as per the agreed upon Management Fee and Payment details.	Customer Experience, Regulatory Compliance, Operational Efficiency
The Management Fee could be revised during the lease term.	Customer Experience

🤔 Assumptions 🔗

📝 Requirements 🔗

Requirement	User Story	Importance	Jira Issue	Notes
		HIGH		

Open Questions 🔗

Question	Answer	Date Answered
Does the Management Fee revision require the Royalty	@Sylwia Barrezueta to answer	

Contract to be revised as well?		

⚠️ Out of Scope 🔗

Medallion Renewal happens outside the system currently. The renewal fees are paid and the renewal receipt is downloaded from TLC site and uploaded into the system.

Medallion Bulk Renewal is needed by April end 2025. There are many medallions that will expire by 31st May 2025 and hence this feature is needed once the system goes live.