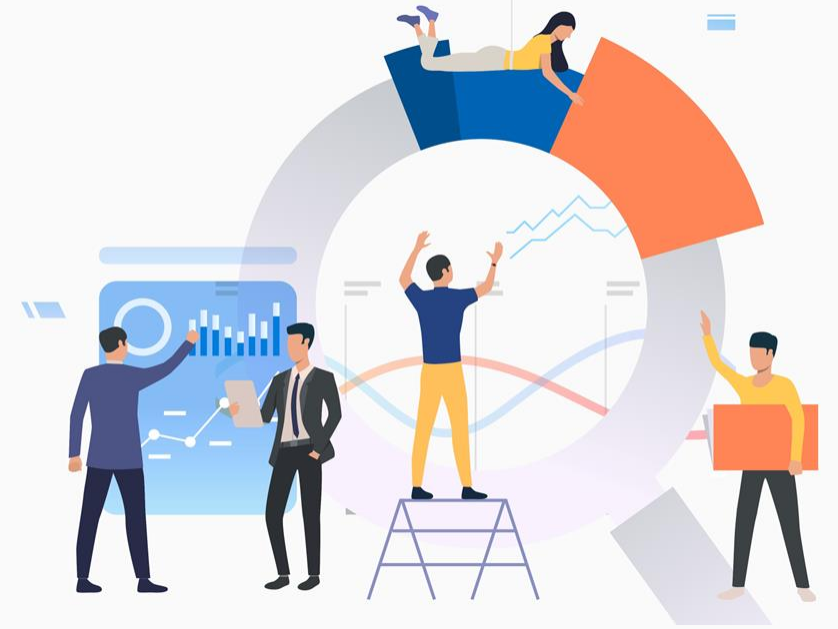




Monthly Business Review

Reporting Period: March 2025

Apr 21, 2025



ECHO - EDC Statistics

Development Summary

230

Completed Stories

worth 804 Story Points

1697

Tasks completed

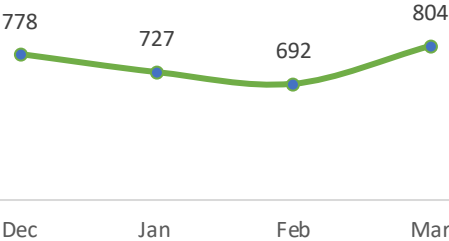
which were activated in the month of March

353

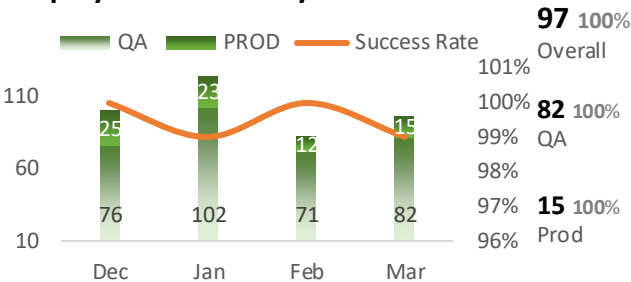
Backlog Health

across all the projects

Story Points Delivered Trend



Deployment Summary



Highlights/Updates

- PPM reportedly achieved ~9% surge in monthly premiums in Q1, adding ~\$1.8M, reaching a total premium volume of \$22M per month.
- PPM introduced Review Transactions module enabling near to real-time collaboration with Brokers on high-risk transactions, reducing bank rejections and streamlining transaction approvals.
- Invested in upskilling** through instructed-led SQL training across the board to further sharpen data proficiency
- Upcoming Blazor training is planned to deepen this capability, ensuring expertise for delivery consistency aligned with ECHO's direction

Quality Assurance Summary

5795

New Test cases created

17207

Test Points Run

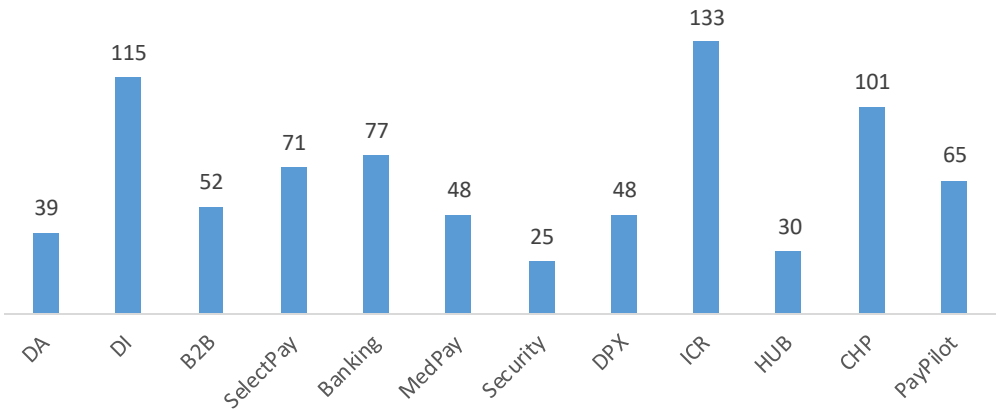
245

Total Defects Reported

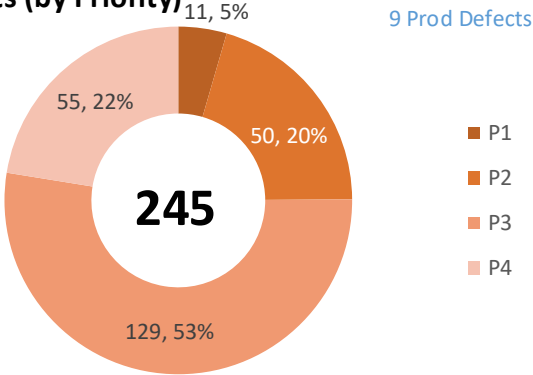
96.5%

Defect Removal Efficiency

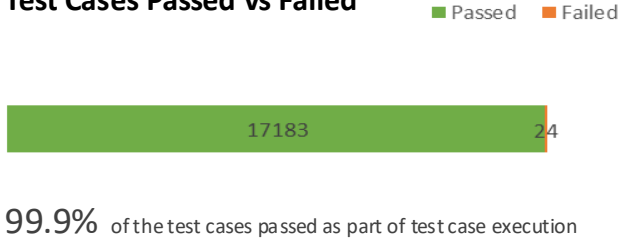
Story Points Resolved (Project-wise)



Defects (by Priority)



Test Cases Passed vs Failed



Outcome & Impact

Premium Payment Manager (ICR)

Outcome/Impact

- Review Transactions Module – a proactive **review layer flagging potential overdraft risks**; enabling Admins & Brokers collaboration to approve or reject these transactions – **reducing avoidable bank rejections, improving Broker engagement, & auto preparing checked-in transactions file** to be sent to the bank
- **Automated Credit/Debit entries in ACH staging** for Huntington Trust account, based on system-led aggregation of Fund/Defund activities across Anchor bank accounts, **enhancing fund flow accuracy and periodic reconciliation.**
- **Mitigated all high-risk vulnerabilities** identified in the FY25 Penetration Testing
- Enforced **stricter API-level access controls** to prevent unauthorized creation or modification of non-admin user records, **ensuring data integrity and compliance.**

Other Updates

- Monthly Fee Process revision - refinement underway; a revised draft is in progress and will be reviewed with other stakeholders.
- Resolved all medium-risk flaws flagged in FY25 Q2 Veracode scan; planned for upcoming release

ECHO Hub

Outcome/Impact

- **Payment System Improvements**
 - **"Simplicity Rx Payment Module"**: Implemented audit logs for default payments and autopay functionality, enabling comprehensive payment tracking
 - Enhanced payment refund capabilities through API development and webhook transaction handling
 - Streamlined financial operations with ACH plan payment generation and resolved billing administration issues
- **Participant Portal Enhancements**
 - Delivered "Pay Now" mobile functionality and one-time payment options, improving user payment experience
 - Enhanced member registration process with TFA email support and streamlined account setup
 - Implemented email notification alerts in the mobile dashboard, keeping users informed of important account activities
- **ECHO Hub & Security**
 - Improved process automation with AutoPay date reminders and notification enhancements
 - Addressed critical security vulnerability with 6 fixes, ensuring platform compliance and data protection
- **Documentation**
 - Created detailed documents to support SRx QA testing, ensuring clear guidelines, scenarios, and expected outcomes
 - Developed API workflow documents to provide a clear view of how different endpoints interact across SimplicityRx modules

Outcome & Impact

ECHO B2B

Outcome/Impact

- Payee will now be taken through an enhanced flow where they would have visibility to all the Virtual cards/drafts that are available during enrolment, video demo to promote e-checks, delayed ACH options with well-defined user guidance and next set of steps, among others for the following flows
 - Pre-Enrollment regular
 - Bulk flows
 - Regular Enrollment flow
 - Enabling mailed paper check functionality

Other Updates

- Security vulnerabilities as part of Veracode scan have been addressed
- Post Magical release, there are Zero tickets to CSR team

DPX Distributor Portal

Outcome/Impact

- ACH Pre-Enrollment – Launching End of April
- The Bulk ACH process has been rebranded to ACH Pre-Enrollment to better reflect its purpose. New features streamline the payee onboarding process for Distributors:
 - A downloadable sample file ensures submission accuracy.
 - Upload previews highlight errors instantly for quick corrections.
 - Clean data can now be processed immediately, reducing turnaround time even as issues are being resolved.
- These updates aim to improve efficiency and enhance the Distributor experience.

ECHO PayPilot Web

Outcome/Impact

- **Payment Methods:** The "Virtual Card Payment" modality has been added to the Payment Types section, expanding the available payment options.
- **Email Integration:** Comprehensive email functionality has been implemented across all existing modules where email placeholder fields were previously established.
- **Grid Enhancements:** Users can now resize and drag column headers in all grids, improving the user experience and data visibility.
- **Payment Fields & Labels:** Significant UI changes have been implemented in the Payment Fields and Labels section, providing enhanced flexibility for users to customize terminology and workflow.

Outcome & Impact

ECHO Security

Outcome/Impact

- **Application Client Access Management:** Easily control which clients can access specific apps and what actions they can perform. Includes intuitive permission settings, secure logins, and organized client-app connections for smooth, and secure access.
- **Email Domain & TPA Management:** Enhanced search and management for email domains and third-party apps, streamlining external communication and boosting security.
- **Enhanced User Personalization in ECHO Security:** Admins can now customize user profiles, app access, and third-party integrations. Includes tailored email templates for more personalized user experiences.

ECHO NextGen

Outcome/Impact

- **Project Management:** Added an Upload File option in Configuration Information during project creation/editing to support relevant document uploads.
- **Project Management:** Introduced a new file format option in the Edit Project screen for modifying project details.
- **User Story Management:** Added a column for all the User Stories grid to indicate if a User Story was created or modified via the application, aiding differentiation.

ECHO Banking

Outcome/Impact

- Enabled fully automated ACH Return File Processing using Active Batch, which eliminates manual intervention and streamlining NACHA return file handling.
- Automated processing of various ACH failed payment types through SRx API.

Other Updates

- Development is underway for a new Plan Account View and update grid to enable real-time retrieval and editing of bank account data from Vault via API, ensures secure and efficient updates across ParentOrg, Contract, and Plan levels.

Blazor Migration

Clearinghouse Portal

Updates

- Migration is on track production is planned by the end of April 2025.
- Demos are completed for all the modules.
- Detailed regression testing & compatibility testing is in progress.

Data Ingestion

Updates

- Environment Configuration Copy: Development is completed.
- Development for the Blazor migration is currently in progress for Client File Administration, Configuration Migration and DB Backup Restore Management modules.
- We are targeting to deliver the above-mentioned modules by April 22nd, 2025.

Data Administration

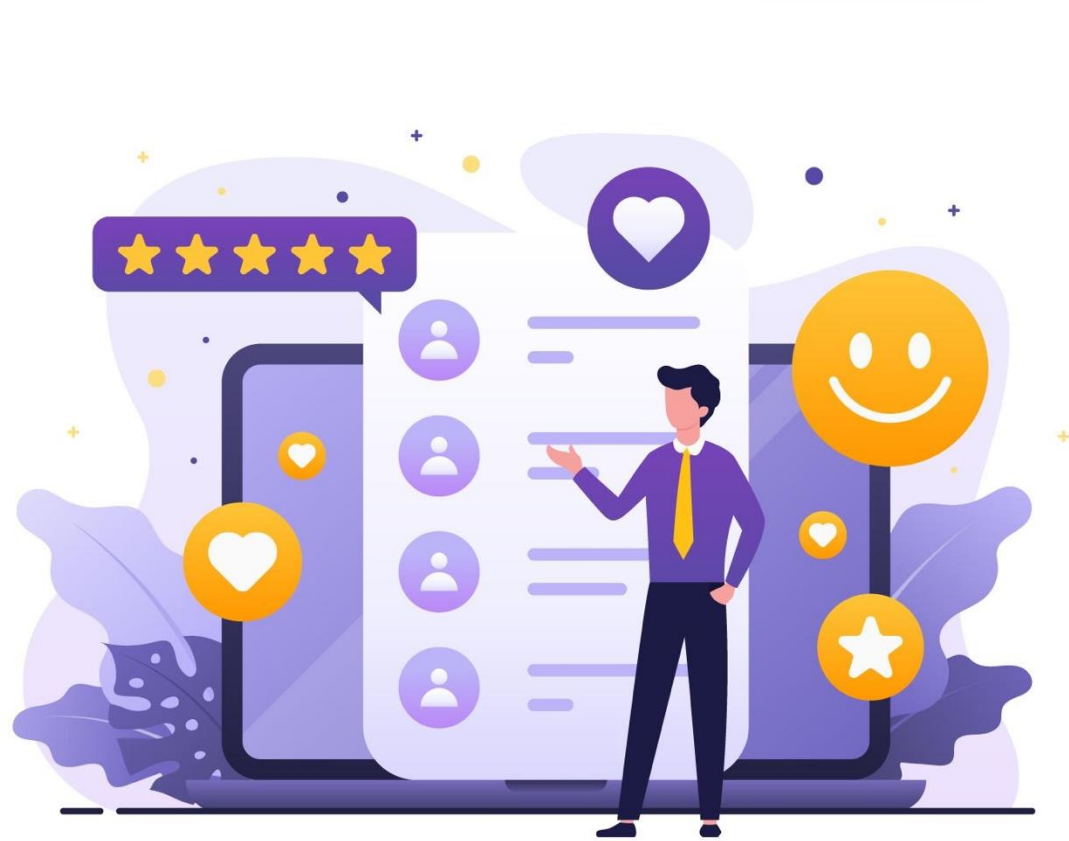
Updates

- Development for the Blazor migration is currently in progress for Administration, DVT, Payor Dashboard, Additional Functionality, 1099s, and Echo Service Fee modules.
- The target completion date for the migration is the end of August 2025.

QA Automation

- HAT Framework Enhancements: 11 New Keywords to support backend automation have been incorporated into the framework.
- Playwright Framework: Awaiting Michael's confirmation to schedule the external demo for POC.
- Collaboration Task: A weekly sync-up call with the HA team to review pull requests and keywords, and to discuss any issues or concerns related to automation.
- ICR Automation: UI regression automation is complete. Currently working on analyzing and fixing failed test cases. Enhancement of database validation for API automation is in progress
- New Project Automation: Automation planning and Smoke suite implementation is completed for CHP, Paypilot, DI/CRUD, DPX. smoke test automation is in progress
- Regression Automation: Regression automation for the planned project is currently in progress. The latest completion status is as follows:

Projects	% Completion	Comments
Select Pay	100%	UI Automation
ECHO Security	45%	Includes API Automation
ECHO DA	30%	Blazor migration completion awaited
ECHO ICR	100%	UI Automation
ECHO HUB	46%	Includes API Automation
TOCIC	16%	UI Automation
MedPay	93%	API Automation



Feedback & Suggestion