

<Client Name>

# Monthly Business Review

Reporting Period:



# EDC Statistics

## Development Summary

230

Completed Stories

worth 804 Story Points

1697

Tasks completed

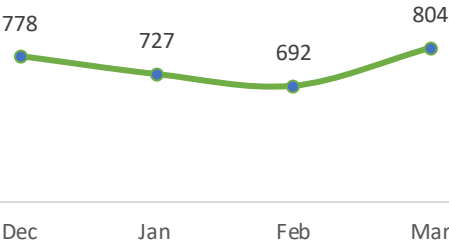
which were activated in the month of March

353

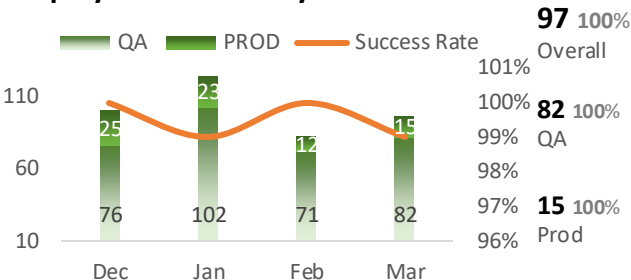
Backlog Health

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

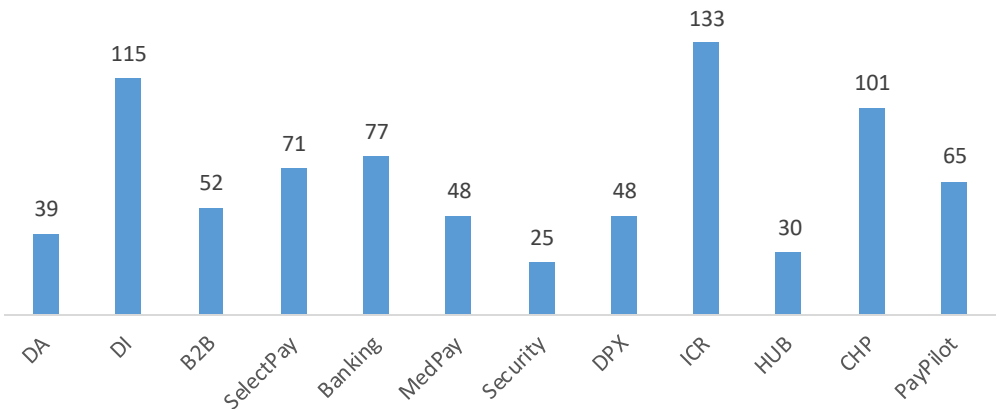
245

Total Defects Reported

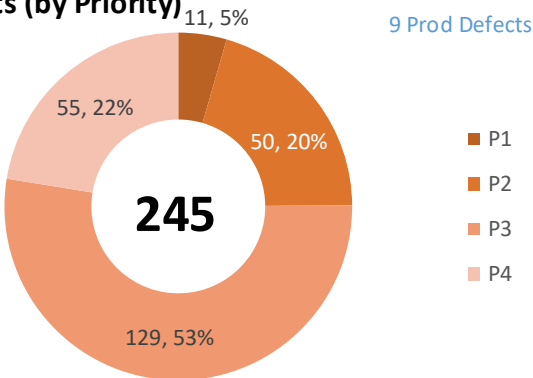
96.5%

Defect Removal Efficiency

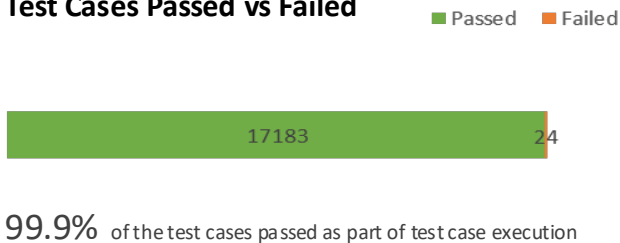
## Story Points Resolved (Project-wise)



## 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

# 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