Project Report: <u>UI Tracker</u> HMJ, LLC

Project Start Date: March 10, 2014 **End Date**: March 31, 2015

ONE *MOTION* technologies — Hide Time Entries for PDF

■ Completed   ■ Upcoming (next 7 days)   ■ Late

Milestones and associated tasks

		Milestone	Description	Due Date	Responsible	Status	Days Late	Date Completed
■		**Build 1.24 Complete**		19 Dec (2014)	Marcus D.	Late	Due 41 days ago	

		Tasklists	Description	Start Date	Date Due	Assigned To	Priority	Progress	Status	Estimated	Time	Billable
		Build 1.24										
	■	Minimum to Save Protests	Initial and Redetermination Levels - All fields except the Decision Date (which is required after the decision is received and is also required to get it off the reminder list on the home screen). The Protest Letter Sent Date field should also be optional (some clients will not use it). Hearing Level – none of the extra fields should be required (only the basics like the other levels should be required).	09 Dec (2014)	09 Dec (2014)	Precy M.		100%	Completed 16 Dec (2014)			
	■	Minimum to Save Claim in Progress	Minimum – only to save progress Name (First and Last) Social Security Number Claim Effective (or Ending) Date Claim Number (either the auto-generated one or manually entered)	09 Dec (2014)	09 Dec (2014)	Precy M.		100%	Completed 16 Dec (2014)			
	■	Minimum to Save Admin Contacts	All fields except Fax Number	09 Dec (2014)	09 Dec (2014)	Precy M.		100%	Completed 16 Dec (2014)			
	■	Minimum to Save Admin Users	Everything except the address and fax number should be required.	09 Dec (2014)	09 Dec (2014)	Precy M.		100%	Completed 16 Dec (2014)			
	■	Choose Protest Level	Admin, Dropdown List, Protest level - ability to choose level format	10 Dec (2014)	10 Dec (2014)	Precy M.		100%	Completed 16 Dec (2014)			
	■	Missing Data	184-78-5928 SSN on Staging. Look at Claims and Charges. Not all info is showing though Client says it is 100% in Sentinel data. Please verify. Employer Potential Liability is one example.	11 Dec (2014)	11 Dec (2014)	Precy M.		100%	Completed 27 Jan (2015)			
	■	Screen Shot/Matrix Training	I know I mentioned this issue when we talked a few weeks ago, but I did not notice this email until today. This shows that Matrix is seeing some of the Workbox claims and info on the staging site. Can you look into it for me? This is obviously a big issue.	20 Jan (2015)	20 Jan (2015)	Precy M.	high	100%	Completed 22 Jan (2015)			
	■	Data Import Issues	EKFOL3V Adrian Perkins our system is showing EKF5ROL3V. How can we stop errors like this from happening?	11 Dec (2014)	11 Dec (2014)	Precy M.		100%	Completed 16 Dec (2014)			
	■	Reporting Date Range	Reporting Date Range - add four quarters, this quarter	11 Dec (2014)	11 Dec (2014)	Precy M.		100%	Completed 19 Dec (2014)			
	■		Create an ongoing changelog that is submitted to git									

Change Log	Create an ongoing changelog that is submitted to git in a folder called Changelogs each month. Changelog is any change made to the build. It could be as simple as: Dec012014 v1.22 - bug fixes - performance optimization - sentinel data import etc, etc	01 Dec (2014)	31 Dec (2014)	Precy M.		100%	Completed 05 Jan (2015)	
Minimum to Finish Claim	Fields listed above Organization Location (and UI Acct #) Separation Date (Last Day Worked auto-generates with same date) Separation Reason Chargeability Status Separation Protest Status If the Separation Protest Status is "Not Protestable" then the Non Protest Reason should be required. Thoughts on this? The remaining fields should be optional (many clients will not bother with them)	09 Dec (2014)	09 Dec (2014)	Precy M.		100%	Completed 10 Dec (2014)	
Minimum to Save Admin Org Unit	Only the Unit Name and Label should be required. However, without a UI Acct Number – claims could not be attached to the unit.	16 Dec (2014)	19 Dec (2014)	Precy M.		100%	Completed 10 Dec (2014)	
Remove Data from Staging Server	Once all of 1.24 is ready, can we remove the data from Staging? It will save the Client from doing it manually.	11 Dec (2014)	02 Jan (2015)	Precy M.		100%	Completed 05 Jan (2015)	
Prod Update	The 'protests for current quarter' graph is not working on production after updating. Please look into this immediately.	15 Dec (2014)	16 Dec (2014)	Josh H.	high	100%	Completed 19 Dec (2014)	
Ohio Import Issues	Please see subtasks	15 Dec (2014)	17 Dec (2014)	Precy M.		100%	Completed 19 Dec (2014)	
• Not Finding Claims	The Client imported the Ohio test file they have been using on Staging.The claims for those charges should be in the data imported from sentinel, but the system did not find the claims corresponding to the charge/ There is some type of disconnect. Please investigate and fix.	15 Dec (2014)	17 Dec (2014)	Precy M.		100%	Completed 16 Dec (2014)	
• Chargeability Dispositions	The chargeability dispositions from the import are not connected correctly - when a non-chargeable is used on a claim, it did not generate a flag on the charges showing them as being on a non-chargeable claim.	15 Dec (2014)	17 Dec (2014)	Precy M.		100%	Completed 16 Dec (2014)	
• Alphabetization	The org units that are imported from Sentinel need to be alphabetized in the pulldowns on the claim screen and on the Org Unit Screen. It is really difficult to work with them when they are not sorted alphabetically.	15 Dec (2014)	17 Dec (2014)	Precy M.		100%	Completed 19 Dec (2014)	
Protest Level Format	Appellate Review Protest should look like first and second level	11 Dec (2014)	11 Dec (2014)	Precy M.		100%	Completed 15 Dec (2014)	
Server Error	There is an internal server error when downloading reports.	15 Dec (2014)	15 Dec (2014)	Precy M.	high	100%	Completed 16 Dec (2014)	
Charges/Credits Report	This report is like the regular charge report, but only showing those charges and credits that were imported from a document or csv file (with a total at the bottom to compare to the imported document).	15 Dec (2014)	17 Dec (2014)	Precy M.	high	90%	Started	
Contacts	The contacts from the imported data are definitely not connected to the org units in the organization tab. They need to be connected.	15 Dec (2014)	17 Dec (2014)	Precy M.		100%	Completed 16 Dec (2014)	

	Company Logos on Letters	Please provide a level of effort quote in regards to putting Organization logos onto Letters.	15 Dec (2014)	15 Dec (2014)	Precy M.	medium	100%	Completed 27 Jan (2015)			
	Third Contact Connection	Please provide a level of effort to add a third contact connection on the org unit screen for now and then add a pop up to show the contact info for that contact.	15 Dec (2014)	17 Dec (2014)	Precy M.		100%	Completed 05 Jan (2015)			
	Request for Information	Please see sample request ltr from sentinel.rtf in Files for the parameters to the Request for Information letter. It works the same as a protest letter, except that it uses the verbiage from this letter and should still be a WYSIWYG with snippets possible. It also should pull the Organization unit info (the client's information) as shown on the letter. This should go on the main Claims screen somewhere (as a button). Should read "Create Request for Information Letter" or something to that effect.	15 Dec (2014)	17 Dec (2014)	Precy M.		100%	Completed 19 Dec (2014)			
	Pushing Builds	Last week, a user's login information was overwritten during the push to staging and live. Please be sensitive to not have this happen again.	15 Dec (2014)	17 Dec (2014)	Precy M.		100%	Completed 19 Dec (2014)			
	Login Issues	Something is going on with the user access on the Matrix database. Yesterday, the Client went in and reset all of the passwords for each user to Matrix365. All were tested and worked. Now, when the Client tries them and none of them work this morning. The Client can't get the system to let me update them again and login with them. It's becoming very frustrating for them - now Matrix can't get into the database to test things and the Client gets to look bad to them again because it won't work. This has to be figured out and corrected. We CANNOT keep overwriting user data. Period.	16 Dec (2014)	16 Dec (2014)	Precy M.	high	100%	Completed 19 Dec (2014)			
	Documents not Downloading	This is probably a pathing issues as well. Please work with Josh to get this fixed on DEV, STAGING and PROD immediately.	16 Dec (2014)	16 Dec (2014)	Precy M.	high	100%	Completed 19 Dec (2014)			
	Deploy 1.24 to staging		05 Jan (2015)	05 Jan (2015)	Precy M.		100%	Completed 05 Jan (2015)			
	Multiple Claims, Single SSN Issue	single SSN, multiple claims doesn't seem to load on Staging. Please check	20 Jan (2015)	20 Jan (2015)	Precy M.	high	100%	Completed 20 Jan (2015)			
	Client Admin and Editor OCR issue	Please verify that OCR works for non Super Admin accounts.	19 Jan (2015)	19 Jan (2015)	Precy M.	high	100%	Completed 22 Jan (2015)			
		We need to check into this. Are there connections from the converted charge data that are not made to the reporting portion of the software? Thanks, MICHAEL MCPHERSON Unemployment Tracker Co-Founder 231.651.9607 --------- Original Message --------- Subject: verifying charge data on claims From: "Sue McCormick" Date: 12/19/14 4:59 pm To: "michael@unemploymenttracker.com" Cc: "Dave Kiley" I just ran a charge report for Catholic Residential for the month of May 2014 and the report									

	Tasklists	Description	Start Date	Date Due	Assigned To	Priority	Progress	Status	Estimated	Time	Billable
	verifying charge data on claims	in UI Tracker is showing no entries, the report in Sentinel is showing entries made for May for Savannah Jenkins SS 275-86-7734. Both credits and charges were entered in May for her which totaled "0" The credits and charges are not showing in UI Tracker. The entries were made on 5/29/14. Here is the print out from Sentinel. Weekly Charges Charge No. Charge Week Date Paid Charge Amount 11 05/10/2014 05/29/2014 $42.02 Edit Delete 12 05/10/2014 05/29/2014 ($42.02) Edit Delete 9 05/03/2014 05/29/2014 $42.02 Edit Delete 10 05/03/2014 05/29/2014 ($42.02) Edit Delete 7 04/26/2014 05/29/2014 $42.02 Edit Delete 8 04/26/2014 05/29/2014 ($42.02) Edit Delete 5 04/19/2014 05/29/2014 $42.02 Edit Delete 6 04/19/2014 05/29/2014 ($42.02) Edit Delete 3 04/12/2014 05/29/2014 $42.02 Edit Delete 4 04/12/2014 05/29/2014 ($42.02) Edit Delete 1 04/05/2014 05/29/2014 $42.02 Edit Delete 2 04/05/2014 05/29/2014 ($42.02) Edit Delete * * * * * * Sue McCormick Unemployment Division Manager The Matrix Companies Gateway West Office Park 644 Linn Street Suite 900 Cincinnati, Ohio 45203 Office: 513.351.1222 Fax: 513.297.4010 Email: smccormick@matrixtpa.com www.matrixtpa.com	20 Jan (2015)	20 Jan (2015)	Precy M.	high	100%	Completed 22 Jan (2015)			
	Code Commits to SVN	Josh has noticed that nothing has been committed to SVN in months. Please report why this is and make sure we're doing code commits.	27 Jan (2015)	27 Jan (2015)	Precy M.	medium	100%	Completed 27 Jan (2015)			
	Reports Error	When doing a Credits/Charges Report for Trustaff, the Reports page freezes up. Please investigate and fix.	27 Jan (2015)	27 Jan (2015)	Don S.	high	40%	Started			

	Build 1.25 Complete			05 Feb (2015)		Marcus D.		Upcoming			

	Tasklists	Description	Start Date	Date Due	Assigned To	Priority	Progress	Status	Estimated	Time	Billable
	Build 1.25										
	Impersonate Feature	Build an Impersonate Feature similar to TW that will allow a Super Admin to impersonate any User.	05 Jan (2015)	09 Jan (2015)	Precy M.|Mary T.		100%	Completed 09 Jan (2015)			
	Quick Add Feature	When filling out a Claim, if a protest reason, or separation reason doesn't exist, the Client would like the ability to Quick Add one. Please estimate hours.	06 Jan (2015)	09 Jan (2015)	Precy M.		100%	Completed 09 Jan (2015)			
	Change Log	Create an ongoing changelog that is submitted to git in a folder called Changelogs each month. Changelog is any change made to the build. It could be as simple as: Dec012014 v1.22 - bug fixes - performance optimization - sentinel data	01 Jan (2015)	31 Jan (2015)	Precy M.		50%	Started			

		import etc, etc							
	Show SSN on Request	Create a checkbox that allows the User to show/hide the full SSN. If it is disabled, it won't show in any downloaded Reports.	07 Jan (2015)	07 Jan (2015)	Precy M.		100%	Completed 08 Jan (2015)	
	Hide Sub Org Units	Hide subordinate org units on request by User.	07 Jan (2015)	07 Jan (2015)	Precy M.		100%	Completed 08 Jan (2015)	
	SSN Security	Be very specific on how we will be executing security surrounding sensitive data.	19 Jun (2014)	19 Dec (2014)	Marcus D.		100%	Completed 26 Jan (2015)	
	Matrix Verification	Please verify the following: reports didn't work, my previous email to Mike explains problems with individual reports charges didn't upload correctly we can't add negative charges when adding charges manually, not sure if they will upload because the upload didn't work the decimal is locked you have to type 200000 to get 200.00 when a adding manual charges noticed that charges were missing from some of the claims	07 Jan (2015)	07 Jan (2015)	Precy M.	medium	70%	Started	
	Charges not working	Cannot manually enter credits (negative charge) on Claim screen. Verify it works on data center	08 Jan (2015)	09 Jan (2015)	Precy M.	high	100%	Completed 22 Jan (2015)	
	Improved Search	Fix search to ignore dashes and such from social numbers so you can search for 123456789 and it will look for 12-345-6789	08 Jan (2015)	08 Jan (2015)	Precy M.	medium	100%	Completed 13 Jan (2015)	
	Less Detailed Reports	For Reports - Region level of this Organization but don't show the breakout of the individual Branches. Or if Company only chosen, don't show Regions or Branches. Basically, it's like the Diggitt Custom TW Report. Allow the user to choose if they only want to see the information for the current level, or the current + all level belows (like it does now)	09 Jan (2015)	15 Jan (2015)	Precy M.		70%	Started	
	Sticky Column Headers	Make the column headers sticky when scrolling on any Report.	15 Jan (2015)	15 Jan (2015)	Precy M.		100%	Completed 27 Jan (2015)	
	OCR Import Report	After importing OCR data, a report is supposed to be generated of what the OCR read. This allows the user to compare what the OCR read vs what was on the original data vs what got into the system. This was never done properly.	09 Jan (2015)	15 Jan (2015)	Precy M.		90%	Started	
	OCR Credits and Charges	Matrix issue - As CLIENT ADMIN and EDITOR - OCR not getting pulled through for credits & charges on imported Claims - catholic residential november 2014	08 Jan (2015)	15 Jan (2015)	Precy M.	high	100%	Completed 22 Jan (2015)	
	OCR Field Import	All fields are working for Workbox and others. Still not working for Matrix. Please check.	08 Jan (2015)	15 Jan (2015)	Precy M.	high	100%	Completed 22 Jan (2015)	
	OCR Import Flags	Flags not working for Matrix.	08 Jan (2015)	15 Jan (2015)	Precy M.	high	100%	Completed 22 Jan (2015)	
	Contact Roles	In addition to a Contact Name, please have a Contact Role dropdown. This would be populated in Admin>Dropdown Lists	09 Jan (2015)	09 Jan (2015)	Precy M.		100%	Completed 22 Jan (2015)	
	Claims Alphabetization	Claim alphabetization - Not working on Client	08 Jan (2015)	15 Jan (2015)	Precy M.	medium	100%	Completed 13 Jan (2015)	

	Claims Alphabetization	Admin and Editor	08 Jan (2015)	13 Jan (2015)	Precy M.	medium	100%	Completed 13 Jan (2015)
	Matrix Separation Reasons	Duplicate list of Separation Reason to Reason on Claim for Matrix only	08 Jan (2015)	08 Jan (2015)	Precy M.		100%	Completed 13 Jan (2015)
	Logos on Reports	Please have Organization Logos appear at the top of reports.	08 Jan (2015)	10 Jan (2015)	Precy M.		100%	Completed 22 Jan (2015)
	Deploy and test 1.24 in staging	Deploy and test 1.24 in staging	19 Jan (2015)	19 Jan (2015)	Precy M.		100%	Completed 19 Jan (2015)
	Matrix Response Due	When we take Matrix live (at some point), can we eliminate the claims in the "Response Due" tab on the home page? There were different date requirements in Sentinel and every claim in the system will show up on this tab, but they do not care about those claims and the response due. All claims entered going forward should be subject to the normal response requirement.	27 Jan (2015)	27 Jan (2015)	Precy M.			Not Started
	Contact Data Not being imported	Please look again at the Sentinel Contact Data. It would appear that Contacts were not imported corrected.	26 Jan (2015)	27 Jan (2015)	Precy M.		90%	Started
	Search Org Path	When displaying Advanced Search Results on the Claims page we currently show a column called Organization. We have been requested by the Client that the entire organizational path should be visible (Region, Branch). We think the easiest way to accommodate this is via a tooltip on the Organization name. This will show vertically the entire path of the Claim.	02 Feb (2015)	20 Feb (2015)	Don S.	low		Not Started
	OCR Import Order	Currently the OCR import order doesn't match what we show on screen when OCR is complete. Some of this is due to exceptions, but to make it easy for the user to compare efficiently, please examine our options for this.	09 Jan (2015)	15 Jan (2015)	Precy M.			Not Started
	Contact Details	Build out a mechanism so when in an Organization, a User can easily see all entered data for a Contact. Maybe a little info icon or some such like the attached file.	02 Feb (2015)	05 Feb (2015)	Don S.			Not Started

	Build 1.26 Complete		20 Feb (2015)	Marcus D.	Upcoming	
	Build 1.27 Complete		31 Mar (2015)	Marcus D.	Upcoming	
	Code Complete		24 Oct (2014)	Marcus D.	Late	Due 97 days ago
	Soft Launch		11 Jun (2014)	Josh H.	Late	Due 232 days ago
	Fruit Basket Sprint Internal Review		20 May (2014)	Marcus D.	Late	Due 254 days ago
	Protests Sprint Internal Review		24 Apr (2014)	Marcus D.	Late	Due 280 days ago
	Claim Financials Sprint Internal		24 Apr (2014)	Marcus D.	Late	Due 280 days ago

	Review		24 Apr (2014)	Marcus D.	Late	Due 288 days ago
	Claims Sprint Internal Review		17 Apr (2014)	Marcus D.	Late	Due 287 days ago
	Admin Sprint Internal Review		04 Apr (2014)	Marcus D.	Late	Due 300 days ago