

Project Report: UI Tracker HMJ, LLC

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



Completed Upcoming (next 7 days) Late

Milestones and associated tasks

	Milestone	Description	Due Date	Status	Days Late	Date Completed
	Build 1.24 Complete		19 Dec (2014)	Late	Due 59 days ago	
	Build 1.25 Complete		12 Jan (2015)	Late	Due 35 days ago	

	Tasklists	Description	Start Date	Date Due	Priority	Progress	Status
Build 1.25							
	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)		100%	Completed 04 Feb (2015)
	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)		100%	Completed 04 Feb (2015)
	Deploy 1.25 on staging	Deploy 1.25 on staging	09 Jan (2015)	09 Jan (2015)		100%	Completed 10 Feb (2015)
	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)	medium	100%	Completed 10 Feb (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 import etc, etc	09 Jan (2015)	09 Jan (2015)		100%	Completed 10 Feb (2015)
	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	09 Jan (2015)	06 Feb (2015)		100%	Completed 04 Feb (2015)

		for the user to compare efficiently, please examine our options for this.					
	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)		100%	Completed 08 Jan (2015)
	Hide Sub Org Units	Hide subordinate org units on request by User.	07 Jan (2015)	07 Jan (2015)		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)		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	17 Dec (2014)	17 Dec (2014)		100%	Completed 10 Feb (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)	16 Jan (2015)	16 Jan (2015)		100%	Completed 10 Feb (2015)
	Charges not working	Cannot manually enter credits (negative charge) on Claim screen. Verify it works on data center	08 Jan (2015)	09 Jan (2015)	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)	medium	100%	Completed 13 Jan (2015)
	Sticky Column Headers	Make the column headers sticky when scrolling on any Report.	15 Jan (2015)	15 Jan (2015)		100%	Completed 27 Jan (2015)

	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)	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)	high	100%	Completed 22 Jan (2015)
	OCR Import Flags	Flags not working for Matrix.	08 Jan (2015)	15 Jan (2015)	high	100%	Completed 22 Jan (2015)
	Claims Alphabetization	Claim alphabetization - Not working on Client Admin and Editor	08 Jan (2015)	15 Jan (2015)	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)		100%	Completed 13 Jan (2015)
	Logos on Reports	Please have Organization Logos appear at the top of reports.	08 Jan (2015)	10 Jan (2015)		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)		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)	06 Feb (2015)		100%	Completed 04 Feb (2015)
	• Take a look at the demo database and the hearings and responses tabs	Also, take a look at the demo database and the hearings and responses tabs. See what you find wrong with it, but I see both the hearings and responses lists duplicated on each (both of them show up in each tab).	04 Feb (2015)	05 Feb (2015)		100%	Completed 04 Feb (2015)
	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)	06 Feb (2015)		100%	Completed 04 Feb (2015)
		When displaying Advanced Search Results on the Claims					

	Search Org Path	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)	06 Feb (2015)	low	100%	Completed 04 Feb (2015)
	QA	Please test this build on Staging.	09 Jan (2015)	09 Jan (2015)		100%	Completed 10 Feb (2015)
	OCR Issues	These charge docs for Michigan would not import. Kept saying form not recognized. This needs to be corrected. Should not be throwing this error on these forms.	15 Jan (2015)	15 Jan (2015)	medium	100%	Completed 10 Feb (2015)
	Response Due Issue	This claim shows up inder responses due tab on home page but there is a date entered in the response sent field on claim.	15 Jan (2015)	15 Jan (2015)		100%	Completed 10 Feb (2015)
	Catholic School Import - Staging	From the Client: I cannot get the Catholic Residential file to import into the system - the "Accept" button is not able to be clicked - is this because it was imported once already? How can we test it again or do they need to choose a different file to try?	08 Feb (2015)	08 Feb (2015)		100%	Completed 10 Feb (2015)
	Launch	Move 1.25 branch to production.	12 Feb (2015)	12 Feb (2015)			Not Started
	• Testing		12 Feb (2015)	13 Feb (2015)		90%	Not Started
	Some Issues	When I enter the social 107-80-1347 UI Tracker is showing Ava Soloman, it should be Josh Evans? I still don't see any data for any of the claims? I tried 276-80-0289 and 310-70-0816. The only one that populates is the one with the wrong name..	06 Feb (2015)	06 Feb (2015)		100%	Completed 13 Feb (2015)
		This is STILL not work. Why is Potential Employer Liability STILL 0.00 ??? Claim Potential Liability x Employer Chargeable Percent = Potential Employer Liability. Then subtract all credits					

	Employer Chargeable Liability	and charges and this gives Liability Balance. If it's a non-chargeable claim then Employer Potential Liability is 0.00 and Liability removed becomes that total. This would also show Liability Balance as negatives. FIX	06 Feb (2015)	06 Feb (2015)		100%	Completed 13 Feb (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)		100%	Completed 13 Feb (2015)
	Request for BitBucket access		12 Feb (2015)	12 Feb (2015)			Not Started

	Build 1.26 Complete		20 Feb (2015)	Upcoming		
	Build 1.27 Complete		31 Mar (2015)	Upcoming		
	Code Complete		24 Oct (2014)	Late	Due 115 days ago	
	Soft Launch		11 Jun (2014)	Late	Due 250 days ago	
	Fruit Basket Sprint Internal Review		20 May (2014)	Late	Due 272 days ago	
	Protests Sprint Internal Review		24 Apr (2014)	Late	Due 298 days ago	
	Claim Financials Sprint Internal Review		24 Apr (2014)	Late	Due 298 days ago	
	Claims Sprint Internal Review		17 Apr (2014)	Late	Due 305 days ago	
	Admin Sprint Internal Review		04 Apr (2014)	Late	Due 318 days ago	