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

Project Start Date: March 10, 2014 **End Date**: June 18, 2015

ONE MOTION technologies

🟩 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 159 days ago	

		Tasklists			Start Date	Date Due	Priority	Progress	Status
	Build 1.24								
🟩		**Minimum to Save Protests**			09 Dec (2014)	09 Dec (2014)		100%	Completed 16 Dec (2014)
🟩		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).							
🟩		**Comments**							
🟩		**Minimum to Save Claim in Progress**			09 Dec (2014)	09 Dec (2014)		100%	Completed 16 Dec (2014)
🟩		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)							
🟩		**Comments**							
🟩		**Minimum to Save Admin Contacts**			09 Dec (2014)	09 Dec (2014)		100%	Completed 16 Dec (2014)
🟩		All fields except Fax Number							
🟩		**Comments**							
🟩		**Minimum to Save Admin Users**			09 Dec (2014)	09 Dec (2014)		100%	Completed 16 Dec (2014)
🟩		Everything except the address and fax number should be required.							
🟩		**Comments**							
🟩		**Choose Protest Level**			10 Dec (2014)	10 Dec (2014)		100%	Completed 16 Dec (2014)
🟩		Admin, Dropdown List, Protest level - ability to choose level format							
🟩		**Comments**							
🟩		**Missing Data**			11 Dec (2014)	11 Dec (2014)		100%	Completed 27 Jan (2015)
🟩		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.							
🟩		**Comments**							
🟩		**Screen Shot/Matrix Training**			20 Jan (2015)	20 Jan (2015)	high	100%	Completed 22 Jan (2015)
🟩		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.							
🟩		**Comments**							
🟩		**Data Import Issues**			11 Dec (2014)	11 Dec (2014)		100%	Completed 16 Dec (2014)
🟩		EKFOL3V Adrian Perkins our system is showing EKF5ROL3V. How can we stop errors like this from happening?							

Comments					
Reporting Date Range	11 Dec (2014)	11 Dec (2014)		100%	Completed 19 Dec (2014)
Reporting Date Range - add four quarters, this quarter					
Comments					
Change Log	01 Dec (2014)	31 Dec (2014)		100%	Completed 05 Jan (2015)
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					
Comments					
Minimum to Finish Claim	09 Dec (2014)	09 Dec (2014)		100%	Completed 10 Dec (2014)
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)					
Comments					
Minimum to Save Admin Org Unit	16 Dec (2014)	19 Dec (2014)		100%	Completed 10 Dec (2014)
Only the Unit Name and Label should be required. However, without a UI Acct Number – claims could not be attached to the unit.					
Comments					
Remove Data from Staging Server	11 Dec (2014)	02 Jan (2015)		100%	Completed 05 Jan (2015)
Once all of 1.24 is ready, can we remove the data from Staging? It will save the Client from doing it manually.					
Comments					
Prod Update	15 Dec (2014)	16 Dec (2014)	high	100%	Completed 19 Dec (2014)
The 'protests for current quarter' graph is not working on production after updating. Please look into this immediately.					
Comments					
Ohio Import Issues	15 Dec (2014)	17 Dec (2014)		100%	Completed 19 Dec (2014)
Please see subtasks					
• Not Finding Claims	15 Dec (2014)	17 Dec (2014)		100%	Completed 16 Dec (2014)
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.					
Comments					
• Chargeability Dispositions	15 Dec (2014)	17 Dec (2014)		100%	Completed 16 Dec (2014)
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.					
Comments					
• Alphabetization	15 Dec (2014)	17 Dec (2014)		100%	Completed 19 Dec (2014)
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.					
Comments					
Protest Level Format	11 Dec (2014)	11 Dec (2014)		100%	Completed 15 Dec (2014)
Appellate Review Protest should look like first and second level					
Comments					

Task	Start	End	Priority	%	Status
Server Error	15 Dec (2014)	15 Dec (2014)	high	100%	Completed 16 Dec (2014)
There is an internal server error when downloading reports.					
Comments					
Charges/Credits Report	15 Dec (2014)	17 Dec (2014)	high	100%	Completed 30 Jan (2015)
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).					
Comments					
Contacts	15 Dec (2014)	17 Dec (2014)		100%	Completed 16 Dec (2014)
The contacts from the imported data are definitely not connected to the org units in the organization tab. They need to be connected.					
Comments					
Company Logos on Letters	15 Dec (2014)	15 Dec (2014)	medium	100%	Completed 27 Jan (2015)
Please provide a level of effort quote in regards to putting Organization logos onto Letters.					
Comments					
Third Contact Connection	15 Dec (2014)	17 Dec (2014)		100%	Completed 05 Jan (2015)
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.					
Comments					
Request for Information	15 Dec (2014)	17 Dec (2014)		100%	Completed 19 Dec (2014)
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.					
Comments					
Pushing Builds	15 Dec (2014)	17 Dec (2014)		100%	Completed 19 Dec (2014)
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.					
Comments					
Login Issues	16 Dec (2014)	16 Dec (2014)	high	100%	Completed 19 Dec (2014)
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.					
Comments					
Documents not Downloading	16 Dec (2014)	16 Dec (2014)	high	100%	Completed 19 Dec (2014)
This is probably a pathing issues as well. Please work with Josh to get this fixed on DEV, STAGING and PROD immediately.					
Comments					
Deploy 1.24 to staging	05 Jan (2015)	05 Jan (2015)		100%	Completed 05 Jan (2015)
Comments					
Multiple Claims, Single SSN Issue	20 Jan (2015)	20 Jan (2015)	high	100%	Completed 20 Jan (2015)
single SSN, multiple claims doesn't seem to load on Staging. Please check					
Client Admin and Editor OCR issue	19 Jan (2015)	19 Jan (2015)	high	100%	Completed 22

| | | | 19 Jan (2015) | 19 Jan (2015) | high | 100% | |

Client Admin and Editor OCR Issue

Please verify that OCR works for non Super Admin accounts.

Comments

verifying charge data on claims			20 Jan (2015)	20 Jan (2015)	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 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

Comments

Code Commits to SVN			27 Jan (2015)	27 Jan (2015)	medium	100%	Completed 27 Jan (2015)

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.

Comments

Reports Error			27 Jan (2015)	27 Jan (2015)	high	100%	Completed 30 Jan (2015)

When doing a Credits/Charges Report for Trustaff, the Reports page freezes up. Please investigate and fix.

Build 1.25 Complete		12 Jan (2015)	Late	Due 135 days ago
Build 1.26 Complete		20 Feb (2015)	Late	Due 96 days ago
Build 1.27 Complete		31 Mar (2015)	Late	Due 57 days ago
Code Complete		24 Oct (2014)	Late	Due 215 days ago
Soft Launch		11 Jun (2014)	Late	Due 350 days ago
Fruit Basket Sprint Internal Review		20 May (2014)	Late	Due 372 days ago
Protests Sprint Internal Review		24 Apr (2014)	Late	Due 398 days ago
Claim Financials Sprint Internal Review		24 Apr (2014)	Late	Due 398 days ago
Claims Sprint Internal Review		17 Apr (2014)	Late	Due 405 days ago
Admin Sprint Internal Review		04 Apr (2014)	Late	Due 418 days ago
Build 1.28 Complete		03 May (2015)	Late	Due 24 days ago