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

Project Start Date: March 10, 2014 **End Date**: January 9, 2015

ONE MOTION technologies

■ Completed   ■ Upcoming (next 7 days)   ■ Late

Milestones and associated tasks

Total Hours: 2197 hrs 41 mins   **Total Estimated Time:** 382 hrs   **Total Billable Time:** 920 hrs 49 mins   **Total NonBillable Time:** 1276 hrs 52 mins

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

		Tasklists	Description	Start Date	Date Due	Assigned To	Priority	Progress	Status	Estimated	Time	Billable
		Build 1.24										
	■	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)	1 hr	None	None
	■	Minimum to Save Admin Contacts	All fields except Fax Number	09 Dec (2014)	09 Dec (2014)	Precy M.		100%	Completed 16 Dec (2014)	1 hr	None	None
	■	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)	1 hr	None	None
	■	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)	1 hr	None	None
	■	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.		90%	Started	2 hrs	None	None
	■	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)	1 hr	None	None
	■	Reporting Date Range	Reporting Date Range - add four quarters, this quarter	11 Dec (2014)	11 Dec (2014)	Precy M.		90%	Started	1 hr	None	None
	■	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.			Not Started	15 mins	None	None
	■	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.			Not Started	None	None	None
	■		Fields listed above Organization Location (and UI Acct #) Separation Date (Last Day Worked auto-									

	Task	Description	Start	End	Assignee	Priority	%	Status	Time		
(green)	Minimum to Finish Claim	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)	1 hr	None	None
(green)	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)	1 hr	None	None
(red)	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.			Not Started	32 hrs	None	None
(red)	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)	17 Dec (2014)	Precy M.			Not Started	15 mins	None	None
(red)	SSN Security	Be very specific on how we will be executing security surrounding sensitive data.	19 Jun (2014)	19 Dec (2014)	Precy M.		60%	Started	1 hr	None	None
	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	90%	Started	None	None	None
	Ohio Import Issues	Please see subtasks	15 Dec (2014)	17 Dec (2014)	Precy M.		90%	Started	None	None	None
	• 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%	Started 16 Dec (2014)	3 hrs	None	None
	• 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%	Started 16 Dec (2014)	30 mins	None	None
	• 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.		90%	Started	3 hrs	None	None
(green)	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)	1 hr	None	None
(green)	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)	30 mins	None	None
	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.	medium	90%	Started	4 hrs	None	None
(green)	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)	1 hr	None	None
(red)	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.			Not Started	None	None	None
(red)		Please provide a level of effort to add a third contact									

	Third Contact Connection	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.			Not Started	6 hrs	None	None
	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.		90%	Started	5 hrs	None	None
	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.		90%	Started	None	None	None
	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	90%	Started	None	None	None
	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	90%	Started	30 mins	None	None
									69 hrs	**None**	**None**