7743: Update Mass Workload Reassignments on Recovery Accounts (36228)

Status: Design in Progress

Details

Team Responsible:	Fiscal	System Test Delivery Date:	March 31, 2017 12:00 PM
Person Responsible:	Eric Chu	Strategic Item:	Select Strategic Value
Requested By:	Consortium	Consortium Management Review:	No
BA Contact:	Sheryl E. Eppler	Security Impact:	Yes
Tester:	Unassigned	Security Impacts Description:	See recommendation 1 e
Release:	17.05	Emergency Approved:	Yes
Priority Release:		Training Impacted:	
Priority:	High	Form/NOA Translations:	Job Aid Online Help N/A
Change Type:	Enhancement Production	Data Impacts:	N/A
SCR Project Phase:	135	Data Impacts Description:	
ETC:	M&O	Outreach Required:	
Funding Source:		Outreach Description:	Yes Job Aid
Regulation Reference:		Release Note Required:	
Regulation Letter Issue Date:	Unassigned	Programs Impacted:	Select a value
Regulation Effective Date:	Unassigned	Migration Impact:	
Committee/Workgroup:	Collections	Migration Impact Description:	TBD
Review By:	Committee: Collections Committee Review Outcome: Committee Review Date:	Other Agency Cross Reference:	Joint Design SCR - Awaiting LRS SCR # LRS SCR _____
SCR Rejection Reason:	Emergency Approval: Karen Rapponotti - 02/23/2017 Select Rejection Reason	Created By:	Sheryl E. Eppler
Test Completion date:	Unassigned	Creation Date:	February 22, 2017 1:13 PM
Closure Date:	Unassigned		

Description

Current Design:	Recovery Accounts are reassigned from one worker to another worker one at a time.
Issue:	When a Collections Worker who is assigned to multiple Recovery Accounts vacates a position, it is extremely time consuming to individually reassign every Recovery Account to a new Worker. Users would like to mass-unassign Recovery Accounts from a Worker or mass-reassign Recovery Accounts.
Recommendation:	1) Create the Recovery Account Workload Reassignment page. This page will allow users to manually transfer or unassign a worker's Recovery Account workload. A worker's

Recovery Account workload is defined by the number of distinct cases with regular Recovery Accounts in Active or Suspended status that are currently assigned to the worker.

a. Navigation   Global: Fiscal
        Local: Collections
        Task: Recovery Account Workload Reassignment (between Recovery Account Workload Inventory and Tax Intercept Account Search).

b. Page Fields
i. From: Select - Required field. The button will take the user to the Select Worker page where the user can search for and select a worker. Upon returning to the page, the Case Workload and Recovery Account Total fields will be populated with the worker's Recovery Account workload/
ii. Case Workload - Non-editable text field. Represents the number of distinct cases with Active/Suspended Recovery Accounts that are assigned to the 'From' worker.   iii. Recovery Account Total - Non-editable text field. Represents the number of Active/Suspended Recovery Accounts that are assigned to the 'From' worker.
iv.   Reassign Type - Required field. Dropdown list with two options: "Unassign" and "Transfer". Indicates whether Recovery Accounts currently assigned to the worker will be unassigned or assigned to another worker.
v. To: Select - Required field. Only displayed and required for Reassign Type: Transfer. The button will take the user to the Select Worker page where the user can search for and select a worker.   vi. Number of Cases - Required field. Editable text field that is constrained to whole non-negative and non-zero numbers. Represents the number of cases with Recovery Accounts to be reassigned.   vii. Reassign - Button. When clicked, find cases with regular Active and Suspended Recovery Accounts assigned to the 'From' worker, up to the Number of Cases entered.
For each case, do one of the following:
- For Reassign Type: Unassign, update all of the regular Active and Suspended Recovery Accounts for that case that are assigned to the 'From' worker to no longer be assigned to the worker.
- For Reassign Type: Transfer, update all of the regular Active and Suspended Recovery Accounts for that case that are assigned to the 'From' worker to be assigned to the 'To' worker.
        When the 'Reassign' button is clicked, it is changed to a grey 'Processing' button and will remain that way until the unassign/transfer process is complete.

c. Page Validations
i. A validation message will be displayed when Reassign is clicked if the value in the Case Workload field is 0.
        "From - The selected worker must have a Case Workload greater than zero."

ii. A validation message will be displayed when Reassign is clicked if the user enters a greater amount into the 'Number of Cases' field than the 'Case Workload' amount.
        "Number of Cases - The Number of Cases entered cannot be greater than the Case Workload."

iii.   A validation message will be displayed when Reassign is clicked with Reassign Type: Transfer and the same worker is selected for the From and To fields.
        "To - The same worker cannot be selected for reassigning From and To."

iv.   A validation message will be displayed when Reassign is clicked with Reassign Type: Transfer and the worker selected in the To field is not in a Collections Unit.
        "To - The selected worker must be in a Collections Unit."

d. Create Page Mappings for the Recovery Account Workload Reassignment page.

e. Create a new Security Right and Security Group for the Recovery Account Workload Reassignment page. Refer to the attached Security Matrix for details.

2) Update the Recovery Account Detail page to allow users to reassign a Recovery Account in Suspended status. For suspended Recovery Accounts, on the Recovery Account Detail page in Edit mode, the Select button will be displayed under the 'Assigned To' field that will link to the Select Worker page where the user can select a worker to assign the Recovery Account to.

3) Create Online Help page for the new C-IV System page: a. Recovery Account Workload Reassignment

4) Create a new job aid.

Alternative
Procedure
Description:

CA Unicenter
Number: