

Meeting Summary



Functional Area: Service Delivery

Sub-Function: Actors and Roles Identification for 360 View

Meeting Date: March 12, 2008

Location: Richmond VA CRM 131

Meeting called by: Terry Witt

Facilitators: Terry Witt, Todd Cole, Martha Freeland

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|------------------------|-----------------|-------------------|-----------------------------|
| Andrea Hott | Joanne Mckay | Brenda Patron | Scott Fowler (Virginia.gov) |
| Angela Bartlett | Yolanda Fleming | Tracey Griffiths | Garry Ellis (SBE) |
| Kathy Jarrell | Betty Jessie | Betty Waltman | Judy Vesely |
| Salome Davis | Shelley Tinsley | Bonita Glover | Nancy Nolde |
| Dennis Barker | Karen Hughes | Prin Cowan (MVDB) | Alice Meyre |
| Martha Brissette (SBE) | | | |

Preparation for meeting:

- Welcome of participants and new members to first Service Delivery BPR session.
- Review of BPR ground rules.

Session Goals and Objectives:

1. Discuss 360 degree view design methodology
2. EA was introduced by Martha.
3. Present framework for gathering actors and role
4. Review use cases for actor and role and add these to the model

Summary:

Terry presented the Service Delivery plan to craft the 360 degree view using the actors and roles presented in existing use cases. Actors and roles will be identified in phase 1 of the Service Delivery plan. Phase 2 will be actually writing use cases for each actor and role to describe what the view must be for that actor or role.

Martha showed and described EA functionality as it pertained to the CSI project. She invited participants to visit dmvnow/csi to visit the html version of EA to see the progress already documented in the software.

Todd trained the group on the methodology developed to gather actor and roles in EA. This method is based on the "party" theory that there are two main parties using the system, individuals or organizations. All users are identified as actors and roles of those actors that can be associated with those 2 "parties."

4 Tax Processing use cases were review and actors/roles identified and added to the model.

Plans for Next Workshop:

Evaluation of the success of the workshop is being evaluated and the next steps will be identified on 3/17/08.

Homework for Next Workshop:

Service Delivery will ask for "Alphabet Soup" to be added to the BP site as a workshop tool.

Service Delivery will ask for an update of BPs on the dmvnow/csi web.

Service Delivery with Tax Processing will research the 3 "mail clerk" actors in EA to determine the differences and will update EA.

Scenario Report with Requirements

Package: Tax Processing

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|--|---------------------------------|--------------|--|
| Detail: | Extract Actors and Roles | | |
| Use Case Name: | Submit Tax Return via Mail | | |
| Status: | Verified | | |
| Author: | TaxProcessingTeam | | |
| Created on: | | Modified on: | |
| Notes: | | | |
| Linked Requirements: | | | |
| Tax filer | | | |
| Mail clerk | | | |
| Tax Examiner | | | |
| No additional actors identified | | | |

| | | | |
|---|--------------------------|--------------|--|
| Use Case Name: | Process Non-Filers | | |
| Status: | Verified | | |
| Author: | TaxProcessingTeam | | |
| Created on: | | Modified on: | |
| Notes: | | | |
| Linked Requirements: | | | |
| Non-filer (? Valid? This will be researched) | | | |
| No additional actors identified | | | |

| | | | |
|--|--|--------------|--|
| Use Case Name: | File Fuels Tax Refund Application electronically | | |
| Status: | Verified | | |
| Author: | TaxProcessingTeam | | |
| Created on: | | Modified on: | |
| Notes: | | | |
| Linked Requirements: | | | |
| Fuels Tax Refund Applicant | | | |
| No additional actors identified | | | |

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|--|--|--------------|--|
| Use Case Name: | File Fuels Tax Refund Application via mail | | |
| Status: | Verified | | |
| Author: | TaxProcessingTeam | | |
| Created on: | | Modified on: | |
| Notes: | | | |
| Linked Requirements: | | | |
| No additional actors identified | | | |