



# **e-OSCAR<sup>®</sup> RELEASE NOTES**

**Version 3.11  
(October 14, 2017)**

## Release 3.11 Summary

The following enhancements will be included in Release v3.11, scheduled for October 14, 2017. Additional details will be provided as we approach the actual release date.

### Enhancement 1: Modification of User Roles and Creation of New Communication Preferences

This new functionality provides Data Furnishers (DF) with greater flexibility in creating and modifying users by allowing any combination of user roles per User ID. This means users will only require one User ID per e-OSCAR® registration. The user role enhancement will also allow for greater segregation of duties and will facilitate the option to opt-in or opt-out of certain e-OSCAR® e-mail communications.

#### Stakeholders:

All DFs (Interactive and Batch)

#### What to Expect:

##### Administrative Functions:

The administrative functions of the current **System Administrator** role will be split into three new roles:

- **Registration Admin**
- **User Admin**
- **Queue Admin**

Various administrative functions such as resetting passwords, adding/deleting subscriber codes, creating queues, setting default passwords and IP address access will not be changing.

The **Registration Admin** (RA) role will be responsible for:

- Maintaining registration information
- Adding CRA reporting relationships
- Adding/deleting subscriber codes
- Requesting Business Type changes and/or deactivation
- Setting IP address access limits

The RA of Record is created at the time of registration and is automatically assigned the **User Admin** (All) role upon initial registration. The RA of Record can add additional roles to their User ID through the **User Profile** menu and will receive all e-OSCAR® email communications, without the ability to opt-out of this channel.

The **User Admin** (UA) role is designed with 3 permission levels.

- A UA with **Permission: All** has all the current **System Administrator** user management functions such as creating, modifying and deleting users, assigning users to queues, creating the default password and resetting passwords.
- A UA with the **Permission: Create** can do everything that the **Permission All** can do, except reset passwords.
- A UA with the **Permission: Reset** can only reset passwords. This is intended to allow a Data Furnisher to segregate duties, removing the reset password function from all other user management functions, if desired.

The **Queue Admin** (QA) role is not assigned to queues and does not have access to transactions, but can:

- Assign users to queues
- Activate ACDV Grouping
- Create, modify and delete queues and queue rules

- Set the queue ACDV Sort Order (by Response Due Date or Date Received)

**Additional Roles:**

- The **ACDV Responder** and **AUD Initiator** roles will have 2 different permissions (Save and Submit) for each role.
  - **ACDV Responder (Submit)** and **AUD Initiator (Submit)** roles can process and submit transactions as they do today.
  - **ACDV Responder (Save)** and **AUD Initiator (Save)** roles will allow for processing of ACDVs and AUDs, but will not allow submission of the transactions.
- A new **Reports Viewer** role with read-only access to reports will be established.
- The existing **Notification Viewer** role will schedule and/or view Notification Reports. This role will automatically be assigned to the **Registration Admin**.
- The new **Archive Viewer** role will be able to schedule, download and view archives.

The current **Queue Manager** and **Compliance Officer** roles will be eliminated.

Existing User IDs will be automatically converted as follows:

- **System Administrator** IDs will be assigned **Registration Admin**, **User Admin** (all), **Queue Admin**, **Reports Viewer**, **Archive Viewer**, and **Notification Viewer** roles.
- **Compliance Officer** and **Queue Manager** IDs will be assigned **Reports Viewer**, **Archive Viewer**, and **Notification Viewer** roles.
- **ACDV Responder** IDs will become the **ACDV Responder (Submit)** role.
- **AUD Initiator** IDs will become the **AUD Initiator (Submit)** role.
- **Notification Viewer** IDs will continue to have the **Notification Viewer** role.

The table below offers a matrix of the automatic conversion of existing roles to the future roles:

Current e-OSCAR User Roles	New User Roles Assigned to Previous User IDs					
System Administrator	Registration Admin	User Admin (all)	Queue Admin	Reports Viewer	Archive Viewer	Notification Viewer
Compliance Officer	Reports Viewer	Archive Viewer	Notification Viewer			
Queue Manager	Reports Viewer	Archive Viewer	Notification Viewer			
ACDV Responder	ACDV Responder (submit)					
AUD Initiator	AUD Initiator (submit)					
Notification Viewer	Notification Viewer					

The graphic below shows the new **Modify User** screen within e-OSCAR® and the new selections for **User Roles**, **User Permissions** and **Communications**:

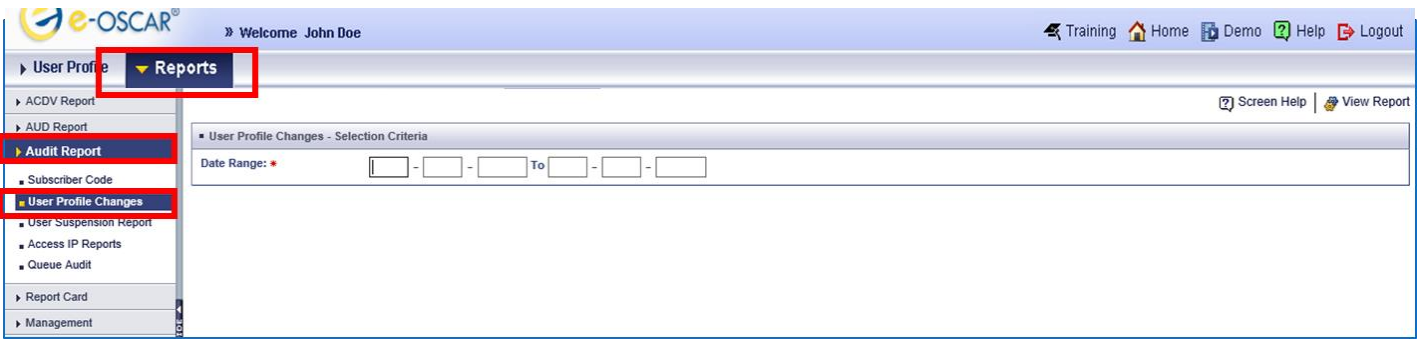
User Profile	Administration	Screen Help   Assign Queues   Submit   Cancel   Delete User		
Modify User - J000000X				
Modify User		User Roles	User Permissions	Report Masking
		All/None		
User ID:	[user id]	<input type="checkbox"/> Registration Admin (RA)	<input type="checkbox"/> Account Number Masking	
First Name:	[user first name]	<input type="checkbox"/> User Admin (UA)	<input type="checkbox"/> Restrict Images	
Last Name:	[user last name]	<input type="checkbox"/> Queue Admin (QA)		
e-mail:	[user e-mail]	<input type="checkbox"/> ACDV Responder (AR)		
Telephone Number:	[user telephone #]	<input type="checkbox"/> AUD Initiator (AI)		
Fax:	[user fax #]	<input type="checkbox"/> Notification Viewer (NV)		
Cost Center Name:	[cost center name]	<input type="checkbox"/> Reports Viewer (RV)		
	<input checked="" type="radio"/> Active <input type="radio"/> Inactive	<input type="checkbox"/> Archive Viewer (AV)		
		<input type="checkbox"/> Application Access Admin (AAA)		
Communications:				
Adhoc Notices:		Scheduled Notices:		
<input type="checkbox"/> Maintenance (MA)		<input type="checkbox"/> Subscriber Code (SC)		
<input type="checkbox"/> System Outages (SO)		<input type="checkbox"/> ACDV Queue Delinquency - 8 days (A8)		
<input type="checkbox"/> New Features (NF)		<input type="checkbox"/> ACDV Queue Delinquency - 12 days (A12)		
<input type="checkbox"/> Training Information (TI)		<input type="checkbox"/> Unread Notifications - 90 days (U90)		
<input type="checkbox"/> Change/Reset Password Notification (PN)		<input type="checkbox"/> Unread Notifications - 115 days (U115)		
<input type="checkbox"/> RA Role Notification (RR)		<input type="checkbox"/> Group User Inactivity - 90 days (G90)		
		<input type="checkbox"/> Individual User Inactivity - 60 days (I60)		
		<input type="checkbox"/> Forgot Password User Verification (FP)		

Following the implementation of these new user roles, certain roles will automatically receive Ad hoc and/or Scheduled Notices via e-mail. Additionally, other users can opt-in or opt-out of emails. The chart below details the email communication matrix:

Communications	Registration Admin. of Record	Registration Admin.	User Admin. of Record	User Admin. (Create & All)	User Admin. (Reset)	Queue Admin.	ACDV Responder (Submit)	ACDV Responder (Save)	AUD Initiator (Submit)	AUD Initiator (Save)	Notification Viewer	Reports Viewer	Archive Viewer
<b>Ad-hoc Notices</b>													
<b>Maintenance</b> <i>(Constant Contact / e-OSCAR Notices)</i>	M	M	O	M	O	I	I	I	I	I	I	I	I
<b>System Outages</b> <i>(Constant Contact / e-OSCAR Notices)</i>	M	M	M	M	M	M	M	M	M	M	M	M	M
<b>New Features</b> <i>(Constant Contact / e-OSCAR Notices)</i>	M	O	O	O	O	I	I	I	I	I	I	I	I
<b>Training Information</b> <i>(Constant Contact / e-OSCAR Notices)</i>	M	O	O	O	O	I	I	I	I	I	I	I	I
<b>Change/Reset Password Notification</b>	M	M	M	M	M	M	M	M	M	M	M	M	M
<b>RA Role Notification</b>		M											
<b>Scheduled Notices</b>													
<b>Subscriber Code</b>	M	M											
<b>ACDV Queue Delinquency (8 days)</b>	M	M				I	O						
<b>ACDV Queue Delinquency (12 days)</b>	M	M				I	O						
<b>Unread Notifications (90 days)</b>	M	M									O		
<b>Unread Notifications (115 days)</b>	M	M									O		
<b>Group User Inactivity (90 days)</b>	M	O	M	M									
<b>Individual User Inactivity (60 days)</b>	M	M	M	M	M	M	M	M	M	M	M	M	M
<b>Forgot Password User Verification</b>	M	O	O	O	I								

M = Mandatory inclusion in mailing list, O = Opt Out of eMail, I = Opt in for eMail

User role conversion activities will be auditable via a **User Profile Audit Report** for anyone with the **Reports Viewer** role (see screen shot below). For each user being converted, there will be one record displayed for all the **Original** values and another record displayed which shows the **Changed** values that occurred with the conversion.



The revised **View/Update Registration** screen in the **Administration** menu (available to any **Registration Admin**) will be automatically populated as follows:

- The current **System Administrator** of Record field will convert to the **Registration Admin** of record.
- The **User Admin** of Record field will be blank.
- The new **Compliance Contact** field will be populated with the name, telephone number and e-mail address for the current **Compliance Officer** of Record.
- The existing **Billing Information** will convert to the **First Billing Contact**.
- The new **Second Billing Contact** field will be blank.

### Enhancement 2: Updates to the e-OSCAR® Terms of Use

The e-OSCAR® Terms of Use (TOU) will be updated to introduce changes to the account.

#### **Stakeholders:**

All DFs (Interactive & Batch)

#### **What to Expect:**

- Changes in user roles replacing **System Administrator** verbiage with **Registration Admin** verbiage throughout the TOU.
- Clauses that address Data Furnisher usage of automated or robotic tools when interacting with e-OSCAR®, specifically including language indicating that such tools cannot negatively impact e-OSCAR® system usability or stability and that Online Data Exchange cannot be responsible for how any e-OSCAR® change impacts upon such tools. Furthermore, clauses added to give e-OSCAR® the right to suspend and/or terminate access to e-OSCAR® for any automation tool if we deem that the use of such tool is negatively impacting the usability or stability of e-OSCAR®.

### Enhancement 3: Requirement to include SSN or DOB in AUDs

For any AUD initiated for consumers where the account **Date Opened** is on or after September 1, 2017, Social Security Number (**SSN**) or the **Date of Birth** for the consumer and associated consumer(s) will be required.

#### **Stakeholders:** All DFs (Interactive and Batch)

- When attempting to create an AUD where the **Date Opened** is on or after September 1, 2017, users will receive the error message below when the **SSN** and **Date of Birth** fields are blank for either the consumer or first and

second associated consumer. Upon correctly completing at least one of these fields, the AUD will be allowed to submit.

- **SSN ERROR AND DATE OF BIRTH ERROR:** *Only one of these fields can be blank if the Account Date Opened is on or after September 1, 2017.*

#### **Enhancement 4: Removal of Response Code 02 from ACDV Related Reports and Forms**

##### **Stakeholders:**

All DFs (Interactive and Batch)

##### **What to Expect:**

Response Code 02 – “Modify Account Information as Indicated” will be removed from:

- All reports, including the Report Card
- Selection criteria picklists in reports
- Printed ACDV response forms
- ACDV archive templates

NOTE: If you require any additional information, please contact the e-OSCAR® Helpdesk at (866) 696-7227 8 am-8 pm ET

**This information is subject to confidentiality terms in the e-OSCAR® System Terms of Use**