UseCaseID	UC-AFF002
Module	Affidavits / Voter Registration Cards
SubModule	
Summary	Update Account Holder. RR/CC does not expect a one-to-one relationship with the outlined steps so long as the outcomes / results are met.
Description	This use case allows staff to update an existing Account Holder. Staff can receive an request from an account holder that their information needs to be updated. The request can be as a result of a phone call, email, letter, etc.
Trigger Event	▪ Staff receives a request to update information
Precondition	▪ Staff has searched for an existing Account Holder record ▪ Staff has appropriate user access rights to the system
ExpectedResult	▪ Staff will update an existing Account Holder ▪ Staff can view all pertinent Account Holder information ▪ Staff can modify pertinent Account Holder information and save the record with changes

DetailedProcessFlow	1. Staff selects option to access Affidavit Accounting
	    1.1. The system shall display affidavit accounting options including searching for an account holder, searching for an account group.
	2. Staff selects option to search for Account Holder
	    2.1. System shall present a list of fields to search for Account Holder(s). Fields include:
	        2.1.1. Organization/Induvial Name
	        2.1.2. Group Type
	        2.1.3. Affidavit #
	3. Staff enters data as search condition
	    3.1. Staff shall be required to enter data in at least one search field:
	        3.1.1. Organization/Individual Name
	        3.1.2. Group Type
	        3.1.3. Affidavit number
	        3.1.4. Affidavit range
	    3.2. Staff shall be able to select options to modify search behavior to include:
	        3.2.1. Phonetic, nickname or fuzzy match of names
	        3.2.2. Affidavit #
	        3.2.3. Group Type
	        3.2.4. Optimized search (where if no account holder is found the search fields are reduced or transposed using a set of known search criteria patterns to result in close matches)
	    3.3. Staff shall be able to use wildcards. Wildcards shall include (SQL examples are given but could be any standard wildcard notation)
	        3.3.1. Zero or more characters (%)
	        3.3.2. A Single character (_)
	        3.3.3. A Single number or letter (#,?)

	3.3.4. Ranges or lists and their negation (^[,])
	4. Staff executes search
	4.1. Staff selects search to start
	5. System displays results
	5.1. If Multiple results:
	5.1.1.A summary list of Account Holder(s) matching search criteria is displayed, with pertinent identifying information, where items in the list are selectable to open the pertinent Account Holder record. Pertinent identifying information include:
	5.1.2.Status
	5.1.3.Organization/Induvial Name
	5.1.4.Contact
	5.1.5.Contact Phone Number
	5.1.6.Affidavit ranges?
	5.2. The system shall allow staff can sort results by any summary fields returned
	5.3. The system shall provide the ability for staff to be able to return to original search screen to modify previously entered search parameters.
	6. Staff selects existing Account Holder
	7. Staff may modify the Account Holder record
	7.1. The system shall allow authorized staff to update any non-fixed information on Account Holder record according to the staff's security role.
	7.1.1.Under Account Holder Staff Updates:
	7.1.1.1. Status
	7.1.1.2. Group (Organization, Individual, etc.)
	7.1.1.3. Registration Distribution Site Flag
	7.1.1.4. Organization Name
	7.1.1.5. Contact
	7.1.1.6. Location
	7.1.1.7. Language (English, Spanish, Mandarin etc.)
	7.1.1.8. Contact Phone number
	7.1.1.9. Permanent Location Flag
	8. Staff saves changes
	9. System Updates Existing Account Holder
	9.1. System shall log all changes to Account Holder record
AlternateFlow	[An Alternate process flow]
Parent	[Parent id of the Use Case as documented in Project Scope or Business Case]
Associated Use cases	▪ Create Account Holder

Requirements	1. UC-AFF002-1 The system shall display affidavit accounting options including searching for an account holder, searching for an account group.
	
	2. UC-AFF002-01 The System shall present a list of fields to search for Account Holder(s). Fields include but not limited to:
	   2.1.1.Organization Name
	   2.1.2.Group Type
	   2.1.3.Affidavit #
	3. UC-AFF002-02 The system shall require staff to enter data in at least one search field:
	   3.1.1.Organization Name

3.1.2. Group Type

3.1.3. Affidavit number

3.1.4. Affidavit range

3.2. UC-AFF002-3 The system shall allow staff shall be able to select options to modify search behavior to include:

3.2.1. Phonetic, nickname or fuzzy match of names

3.2.2. Affidavit #

3.2.3. Group Type

3.2.4. Optimized search (where if no account holder is found the search fields are reduced or transposed using a set of known search criteria patterns to result in close matches)

3.3. UC-AFF002-4 The system shall allow staff shall be able to use wildcards. Wildcards shall include (SQL examples are given but could be any standard wildcard notation)

3.3.1. Zero or more characters (%)

3.3.2. A Single character (_)

3.3.3. A Single number or letter (#,?)

3.3.4. Ranges or lists and their negation (^[,])

4. UC-AFF002-5 The system shall display account holder search results:

4.1. If Multiple results:

4.1.1. A summary list of Account Holder(s) matching search criteria is displayed, with pertinent identifying information, where items in the list are selectable to open the pertinent Account Holder record. Pertinent identifying information include:

4.1.2. Status

4.1.3. Organization Name

4.1.4. Contact

4.1.5. Contact Phone Number

4.1.6. Affidavit ranges

5. UC-AFF002-5 The system shall allow authorized staff to update any non-fixed information on Account Holder record according to the staff's security role.

5.1.1. Under Account Holder details staff updates:

5.1.1.1. Status

5.1.1.2. Group (Organization, Individual, etc.)

5.1.1.3. Registration Distribution Site Flag

5.1.1.4. Organization Name

5.1.1.5. Contact

5.1.1.6. Location

5.1.1.7. Language (English, Spanish, Mandarin etc.)

5.1.1.8. Contact Phone number

5.1.1.9. Permanent Location Flag

6. UC-AFF002-6 The system update existing Account Holder information

6.1. UC-AFF002-7 The system shall log all changes to Account Holder record

RequirementID	
Additional Requirements	NA
Risk	[List of Risk IDs]
Actors	Staff

Documents	[List of documentation name, Link or location]
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Date	5/10/2021

USE CASE WORKSHEET