Committee Management Use Case Specification: Common Use Case Components

Version 1.7

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REVISION HISTORY

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12-10-01	1.0	Initial creation of document.	C Blizard
03-01-02	1.1	Updated with new components	Carl Newcomer
04-10-02	1.2	Added Get IC CMO Name specs	C Blizard
4-17-02	1.3	Added several look up tables	C Blizard
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4-23-02	1.5	Added additional system id's. Added Textual Flow. Alphabetized sub sections.	C Blizard
4-25-02 – 4/30/02	1.6	1. Added Acronym to Algorithms section. 2. Modified field names for Meeting Location Data Specs. 3. Added City State Zip format, Degree Format, Name Format, Force Upper Case and Include Phone/Fax/E-Mail to the Algorithms section. 4. Modified wording in the following sections based on comments from Verle Wright – (3.1.4 Meeting Maintenance Elements, 4.1.8 Ethnicity Types, 4.1.18 Racial Ethnic Types, 4.2.4 Degree Exists, 4.2.7 Get IC CMO Name, 4.2.8 Get Institution Name, 4.2.10 Meeting Versions, 4.2.11 Race Flag, 4.2.12 Roster Address Exists, 4.2.13 Set Err Flag and 4.2.14 Social Security Number (SSN) Flag. Note, the section numbers may change slightly due to adding new sections to this document. 4. Added Person Address, Person and Race Data Elements. 5. Added Other Requirements, Report Cover and End Sheets. 6. Added Report Cover and End Sheets to Data Specs section. 7. Added Report Title Editing to the Other Requirements Section.	C Blizard
05/02/02	1.7	Updated with comments from Release 1 CDR 1	Carl Newcomer

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1. Brief Description

This document, Common Use Case Components, describes common Data Specifications and Special Requirements for the Committee Management J2EE effort.

2. Textual Flows

2.1.1 System Ids

1. Select the Sys ID's option
2. The system displays the relevant system ID's.

3. Data Specifications

3.1.1 Committee Staff (Federal Staff) Repeating Elements

Committee Staff repeating elements displays information from the cmte_fed_staffs_t table where the cmtes_t.cmte_id = cmte_fed_staffs_t.cmte_id and the cmte_fed_staffs_t.start_date is less than or equal to the system date and the cmte_fed_staffs_t.end_date is greater than or equal to the system date or null and meets the following condition:

1. SRA/Executive Secretary Option: When called from this option, the system only displays federal_staff_type_codes equal to 'S' for SRA or 'E' for Executive Secretary. See Data Validation for Federal Staff Types.
2. Contact Person Option: The system displays all federal staff. See Data Validation for Federal Staff Types.

The system will allow the return set to be further reduced as some committees have a large number of federal staff.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Federal Staff Number	A unique number identifying a federal staff.	Number(6)	Not Visible	N/A
	cmte_fed_staffs_t.fed_staff_num (primary key)			
Person ID	A unique number identifying a person.	Number(10)	Not Visible	N/A
	cmte_fed_staffs_t.person_id (foreign key from persons_t)			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Last Name	Last name of the selected person.	Char(30)	Queryable	N/A
	persons_t.last_name			
First Name	First name of the selected person.	Char(30)	Display Only	N/A
	persons_t.first_name			
Middle Name	Middle name of the selected person.	Char(30)	Display Only	N/A
	persons_t.mi_name			
SRA/Org. Designator	An acronym of the branch or section holding the meeting (For SEPs only!).	Char(6)	Queryable	N/A
	cmte_fed_staffs_t.meeting_org_acronym_code			
SRA Flex Code	The SRA Flex code of the SRA holding the meeting (For SEPs only!).	Char(4)	Queryable	N/A
	cmte_fed_staffs_t.fed_staff_init_text			
Federal Staff Type Code	A code identifying the type of federal staff.	Char(2)	Queryable, See Data Validation for Federal Staff Types	N/A
	cmte_fed_staffs_t.fed_staff_type_code (foreign key from cmte_fed_staff_types_t)			
Federal Staff Title	The title of federal staff person.	Char(60)	Display Only	N/A

3.1.2 Committee View Elements

Element Name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Committee Acronym	A unique acronym for the committee.	Char(6)	Display Only	N/A
	cmtes_t.nih_abbr_code			
Committee Flex Code	A code to identify subcommittees.	Char(1)	Display Only	N/A
	cmtes_t.flex_code			

Element Name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Institute or Center Code (formally known as the Public Health Services Code)	A unique acronym for an institute or center within DHHS.	Char(2)	Display Only	N/A
	cmtes_t.phs_org_code			
Committee Agency Acronym	The agency acronym of the committee	Char(10)	Display Only	N/A
	cmtes_t.agency_acronym			
Committee Type	The type of committee.	Char(3)	Display Only	N/A
	cmtes_t.cmte_type_code			
Committee Title	The formal title of the committee.	Char(120)	Display Only	N/A
	cmtes_t.cmte_title			
Parent Committee Elements:	See Algorithms for Subcommittee Identification			
Sub. of:	Derived element. A flag which indicates if the committee is a subcommittee.	Char(1)	Display Only	If 'Y' display check, if 'N' display blank
	N/A			
Parent Committee Acronym	A unique acronym for the committee.	Char(6)	Display Only	N/A
	cmtes_t.nih_abbr_code			
Parent Committee Flex Code	A code to identify subcommittees.	Char(1)	Display Only	N/A
	cmtes_t.flex_code			
Parent Institute or Center Code (formally known as the Public Health Services Code)	A unique acronym for an institute or center within DHHS.	Char(2)	Display Only	N/A
	cmtes_t.phs_org_code			
Parent Committee Agency Acronym	The agency acronym of the committee	Char(10)	Display Only	N/A
	cmtes_t.agency_acronym			
Parent Committee Type	The type of committee.	Char(3)	Display Only	N/A
	cmtes_t.cmte_type_code			
Parent Committee Title	The formal title of the committee.	Char(120)	Display Only	N/A
	cmtes_t.cmte_title			

3.1.3 Meeting Location Repeating Elements

Meeting location repeating elements provides a mechanism to select from a list of valid meeting locations to eliminate the need for the user to re-key the full address. However, this table is not updatable except for an administrator type which has not been defined yet. Since this list will grow quite large, the user will need to reduce the list by querying on any or all fields below.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Meeting Address ID	A unique number identifying a meeting address	Number(10)	Not Visible	N/A
	meeting_addresses_t.meeting_address_id			
Hotel/Organization	Line 1 of the address.	Char(50)	Queryable	N/A
	meeting_addresses_t.hotel_org			
Building	Line 2 of the address.	Char(50)	Queryable	N/A
	meeting_addresses_t.building			
Street Address	Line 3 of the address.	Char(50)	Queryable	N/A
	meeting_addresses_t.street_address			
City	Name of the city.	Char(35)	Queryable	N/A
	meeting_addresses_t.city_name			
State	State code.	Char(2)	Queryable	N/A
	meeting_addresses_t.state_code			
ZIP	ZIP code.	Char(9)	Queryable	N/A
	meeting_addresses_t.zip_code			
Phone Number	Meeting location phone number.	Char(25)	Queryable	N/A
	meeting_addresses_t.phone_num			
FAX Number	Meeting location FAX #.	Char(25)	Queryable	N/A
	meeting_addresses_t.fax_num			

3.1.4 Meeting Maintenance Elements

Meetings are currently stored in the meeting_agendas_t table. Meetings are primarily set up by the current bridge process. When applications are assigned to Initial Review Groups (IRGs), Special

Emphasis Panels (SEPs), or National Advisory Councils (NACs) a meeting shell record is created in meeting agendas (meeting_agendas_t) by the bridge.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Agenda Sequence Number	A unique number identifying a Meeting.	Number(6)	Display Only	N/A
	meeting_agendas_t.agenda_seq_num (primary key)			
Version Agenda Sequence Number	The agenda sequence number of the versioned meeting.	Number(6)	Not Visible	N/A
	meeting_agendas_t.version_agenda_seq_num (foreign key from meeting_agendas_t)			
Parent Agenda Sequence Number	A number identifying the parent meeting.	Number(6)	Display Only	N/A
	meeting_agendas_t.parent_agenda_seq_num (foreign key from meeting_agendas_t)			
Fiscal Year Meeting Number	A unique sequence number assigned to each committee based on fiscal year.	Number(5)	Display Only	N/A
	meeting_agendas_t.fy_meeting_num			
Committee ID	A system generated unique number assigned to each committee.	Number(6)	Not Visible	N/A
	meeting_agendas_t.cmte_id (foreign key from cmtes_t)			
Committee Acronym	A unique acronym for the committee.	Char(6)	Display Only	N/A
	meeting_agendas_t.nih_abbr_code			
Committee Flex Code	A code to identify subcommittees.	Char(1)	Display Only	N/A
	cmtes_t.flex_code			
FACA Meeting Flag	Identifies the meeting as a FACA Meeting or a Non-FACA Meeting.	Char(1)	Required, {'F' - default, 'N'}	If 'F' display 'FACA Final Scoring', if 'N' display Non-FACA/Workgroup.
	meeting_agendas_t.faca_nonfaca_code			
Start Date	The meeting start date.	Date, mm/dd/yyyy	Optional, Must be less than or equal to End Date.	N/A
	meeting_agendas_t.start_date			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Start Time	The meeting start time.	Char(4), hh:mm	Optional, Must be less than or equal to End Date and End Time.	N/A
	meeting_agendas_t.start_time			
Start Meridian Code	The meridian start code.	Char(2)	Optional {AM=default, PM}, Must be less than or equal to End Date, End Time, and End Meridian Code.	N/A
	meeting_agendas_t.start_meridian_code			
End Date	The meeting end date.	Date, mm/dd/yyyy	Optional, Must be greater than or equal to Start Date.	N/A
	meeting_agendas_t.end_date			
End Time	The meeting end time.	Char(4), hh:mm	Optional, Must be greater than or equal to Start Date and Start Time.	N/A
	meeting_agendas_t.end_time			
End Meridian Code	The meridian end code.	Char(2)	Optional {AM=default, PM}, Must be greater than or equal to Start Date, Start Time, and Start Meridian Code.	N/A
	meeting_agendas_t.end_meridian_code			
Fiscal Year	The fiscal year of the meeting.	Number(4)	Required, Minimum = 1960, Maximum = 2099	N/A
	meeting_agendas_t.meeting_fy			
Group Code	A code used for grouping meetings within a review cycle. Char(2)	Optional,	If single digit numeric, pad with leading zero (i.e., '01', '05', '10', '12'). If alpha, remove preceeding blank (i.e., 'A ', 'C ', 'EF').	N/A
	meeting_agendas_t.group_code			
Council Date	The month and calendar year of the application review cycle for the meeting.	Date, mm/yyyy	Required	N/A
	meeting_agendas_t.council_date			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Meeting Explanation	A code defining the meeting explanation (For SEPs only!).	Char(1)	Optional, See Data Validation Meeting Explanation Codes	N/A
	meeting_agendas_t.meeting_explanation_code (foreign key from meeting_explanations_t)			
Meeting Explanation Description	A description of the meeting explanation code.	Char(60)	Display Only, See Data Validation Meeting Explanation Codes	N/A
	meeting_explanations_t.descrip			
Meeting Format	A code defining the classification of a meeting.	Char(1)	Optional, See Data Validation Meeting Classification Codes	N/A
	meeting_agendas_t.meeting_classification_code (foreign key from meeting_classifications_t)			
Meeting Format Description	A description of the classification code.	Char(60)	Display Only, See Data Validation Meeting Classification Codes	N/A
	meeting_classifications_t.descrip			
Meeting Type Code	A code defining the meeting type.	Char(1)	Optional, See Data Validation Meeting Types Codes	N/A
	meeting_agendas_t.meeting_type_code (foreign key from meeting_types_t)			
Meeting Type Code Description	A description of the meeting type code.	Char(60)	Display Only, See Data Validation Meeting Types Codes	N/A
	meeting_types_t.descrip			
Agenda Code	A code defining the agenda of the meeting.	Char(2)	Optional, See Data Validation Agenda Classification Codes	N/A
	meeting_agendas_t.agenda_classification_code (foreign key from agenda_classification_types_t)			
Agenda Code Description	A description of the agenda code.	Char(120)	Display Only, See Data Validation Agenda Classification Codes	N/A
	agenda_classification_types_t.descrip			
Agenda Code Text	Free-form text for an agenda code of 'Other'.	Char(400)	See Algorithm for Agenda Code Text.	N/A
	meeting_agendas_t.agenda.agenda_text			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Access Code	A code defining the meeting access (e.g. open, closed, or paritally closed).	Char(2)	Optional, See Data Validation Meeting Access Types.	N/A
	meeting_agendas_t.meeting_access_type_code (foreign key from meeting_access_types_t)			
Access Code Description	A description of the meeting access code.	Char(60)	Display Only, See Data Validation Meeting Access Types.	N/A
	meeting_access_types_t.descrip			
Panel Name	Name of the Panel holding the meeting (For SEPs, NACs, and PACs only).	Char(240)	Optional	N/A
	meeting_agendas_t.panel_name			
Subcommittee Meeting	Check this box when the meeting is being held as a subcommittee meeting of another parent meeting (For NACs Only).	Char(1)	Optional, {'Y', 'N'}	If 'Y' display check if 'N' display null.
	meeting_agendas_t.subcommittee_meeting_code			
SRA/Executive Secretary Option	An option to activate a list of Federal Staff Persons from which to pick. Populates elements below. See Data Specifications for Federal Staff Repeating Elements. This option returns a federal staff number (cmte_fed_staffs_t.fed_staff_num) which is used for the foreign key named meeting_agendas_t.fed_staff_num.			
Federal Staff Number	A unique number identifying the Federal Staff.	Number(6)	Not Visible	N/A
	meeting_agendas_t.fed_staff_num (foreign key from cmte_fed_staffs_t)			
Person ID	A unique number identify a person.	Number(10)	Not Visible	N/A
	cmte_fed_staffs_t.person_id (foreign key from persons_t)			
Last Name	Last name of federal staff person.	Char(30)	Display Only	N/A
	persons_t.last_name			
First Name	First name of federal staff person.	Char(30)	Display Only	N/A
	persons_t.first_name			
Middle Name	Middle name of federal staff person.	Char(30)	Display Only	N/A
	persons_t.mi_name			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
SRA/Org. Designator	An acronym of the branch or section holding the meeting (For SEPs only!).	Char(6)	Display Only	N/A
	cmte_fed_staffs_t.meeting_org_acronym_code			
SRA Flex Code	The SRA Flex code of the SRA holding the meeting (For SEPs only!).	Char(4)	Display Only	N/A
	cmte_fed_staffs_t.fed_staff_init_text			
Contact Person Option	An option to activate a list of Federal Staff Persons from which to pick. Populates elements below. See Data Specifications for Federal Staff Repeating Elements. This option returns a federal staff number (cmte_fed_staffs_t.fed_staff_num) which is used for the foreign key named meeting_agendas_t.contact_fed_staff_num.			
Contact Federal Staff Number	A unique number identifying the Contact Federal Staff.	Number(6)	Not Visible	N/A
	meeting_agendas_t.contact_fed_staff_num (foreign key from cmte_fed_staffs_t)			
Person ID	A unique number identify a person.	Number(10)	Not Visible	N/A
	cmte_fed_staffs_t.person_id (foreign key from persons_t)			
Last Name	Last name of federal staff person.	Char(30)	Display Only	N/A
	persons_t.last_name			
First Name	First name of federal staff person.	Char(30)	Display Only	N/A
	persons_t.first_name			
Middle Name	Middle name of federal staff person.	Char(30)	Display Only	N/A
	persons_t.mi_name			
Meeting Location Option	An option to activate a list of Meeting Locations from which to pick. Populates elements below. See Data Specifications for Meeting Location Repeating Elements. Currently the system has a foreign key to meeting locations named meeting_agenedas_t.meeting_address_id. However, this foreign key is being dropped and should not be used any longer!			
Hotel/Organization	Line 1 of the address.	Char(50)	Required	N/A
	meeting_agendas_t.line_1_addr			
Building	Line 2 of the address.	Char(50)	Optional	N/A
	meeting_agendas_t.line_2_addr			
Street Address	Line 3 of the address.	Char(50)	Optional	N/A

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
	meeting_agendas_t.line_3_addr			
City	Name of the city.	Char(35)	Required	N/A
	meeting_agendas_t.city_name			
State	State code.	Char(2)	Required	N/A
	meeting_agendas_t.state_code			
ZIP	ZIP code.	Char(9)	Optional	N/A
	meeting_agendas_t.zip_code			
Phone Number	Meeting location phone number.	Char(25)	Optional	N/A
	meeting_agendas_t.phone_num			
FAX Number	Meeting location FAX #.	Char(25)	Optional	N/A
	meeting_agendas_t.fax_num			
For CMO Use Only:				
Authority to Close Code	A code defining the authority to close for the meeting.	Char(2)	Optional, See Data Validation for Authority to Close Types.	N/A
	meeting_agendas_t.authority_to_close_code (foreign key from authority_to_close_types_t)			
Authority to Close Code Description	A description of the authority to close code.	Char(80)	Display Only, See Data Validation for Authority to Close Types.	N/A
	authority_to_close_types_t.descrip			
Authority to Close Text	Free-form text for the authority to close code of 'Other'.	Char(400)	Required for authority to close code equal to Other (authority_to_close_types_t.authority_to_close_code equal to '05'). Cleared/display only for all other values.	N/A
	meeting_agendas_t.authority_to_close_text			
Reason to Close Code	A code defining the reason to close a meeting.	Char(2)	Optional, See Data Validation for Reason to Close Types.	N/A

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
	meeting_agendas_t.reason_to_close_code (foreign key from reason_to_close_types_t)			
Reason to Close Code Description	A description of the reason to close code.	Char(80)	Display Only, See Data Validation for Reason to Close Types.	N/A
	reason_to_close_types_t.descrip			
Reason to Close Text	Free-form text for the reason to close code of 'Other'.	Char(400)	Required for reasons to close code equal to Other (reason_to_close_types_t.reason_to_close_Code equal to '07'). Cleared for all other values.	N/A
	meeting_agendas_t.reason_to_close_text			
Rates:				
Maximum Lodging	Maximum daily lodging permitted by GSA.	Number(5,2)	Not Visible, Defaulted on create to 'GSA_MAX_LODGING _AMT' on add from impacii_system_param eters_t table.	N/A
	meeting_agendas_t.gsa_max_lodging_amt			
M&IE	Maximum daily per diem permitted by GSA.	Number(5,2)	Not Visible, Defaulted on create to 'GSA_MAX_MIE_AMT' on add from impacii_system_param eters_t table.	N/A
	meeting_agendas_t.gsa_max_perdiem_amt			
Consultant Fee	Daily consultant fee amount.	Number(7,2)	Not Visible, Defaulted on create to 'CONSULTANT_FEE_ AMT' on add from impacii_system_param eters_t table.	N/A
	meeting_agendas_t.consultant_fee_amt			
Air Mileage Rate	GSA rate for air travel.	Number(5,3)	Not Visible, Defaulted on create to 'GSA_RATE_AIR_AMT' on add from impacii_system_param eters_t table.	N/A
	meeting_agendas_t.gsa_rate_air_amt			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Auto Mileage Rate	GSA rate for auto travel.	Number(5,3)	Not Visible, Defaulted on create to 'GSA_RATE_AUTO_AMT' on add from impacii_system_parameters_t table.	N/A
	meeting_agendas_t.gsa_rate_auto_amt			
Motorcycle Mileage Rate	GSA rate for motorcycle travel.	Number(5,3)	Not Visible, Defaulted on create to 'GSA_RATE_MOTORCYCLE_AMT' on add from impacii_system_parameters_t table.	N/A
	meeting_agendas_t.gsa_rate_motorcycle_amt			
SREA:				
Application ID	Application ID of the assigned SREA or chairgrant.	Number(10)	Not Visible, See Algorithm for SREA Assignment	N/A
	meeting_agendas_t.appl_id (foreign key from appls_t)			

3.1.5 Meeting View Elements

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
SRA/Org. Designator	An acronym of the branch or section holding the meeting (For SEPs only!).	Char(6)	Display Only	N/A
	cmte_fed_staffs_t.meeting_org_acronym_code			
SRA Flex Code	The SRA Flex code of the SRA holding the meeting (For SEPs only!).	Char(4)	Display Only	N/A
	cmte_fed_staffs_t.fed_staff_init_text (derived from meeting_agendas_t.fed_staff_num)			
Group Code	A code used for grouping meetings within a review cycle.	Char(2)	Display Only	N/A
	meeting_agendas_t.group_code			
Start Date	The meeting start date.	Date, mm/dd/yyyy	Display Only	N/A
	meeting_agendas_t.start_date			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
End Date	The meeting end date.	Date, mm/dd/yyyy	Display Only	N/A
	meeting_agendas_t.end_date			
Council Date	The month and calendar year of the application review cycle for the meeting.	Date, mm/yyyy	Display Only	N/A
	meeting_agendas_t.council_date			
Panel Name	Name of the Panel holding the meeting (For SEPs, NACs, and PACs only).	Char(240)	Display Only	N/A
	meeting_agendas_t.panel_name			

3.1.6 Person Data Elements

Person Data Elements are used throughout CM.   The following table lists which elements are used in CM.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Person id		Number(10)	Required.	N/A
	Persons_t.person_id			
First name				N/A
Mi name				N/A
Last Name				N/A
SSN				N/A
Ethnicity Type Code				N/A
Title				N/A
				N/A

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Trans First Name				N/A
Trans First Name				N/A
Trans Last Name				N/A
Gender Code				N/A

3.1.7 Person Address Data Elements

Several reports within CM output the person address information.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Address Type Code	The type of address.	Char(3)	Hidden.	N/A
	Person_addresses_t.addr_type_code			
Preferred Address Type Code	Indicates if this address is the preferred address of the address type.	Char(1)	Hidden	N/A
	Person_addresses_t.preferred_addr_code			
Address Line 1	Outputs the data entered in address line 1.	Char(150)	Left Justified.	N/A
	Person_address_t.line_1_addr			
Address Line 2	Outputs the data entered in address line 2.	Char(150)	Left Justified.	N/A
	Person_address_t.line_2_addr			
Address Line 3	Outputs the data entered in address line 3.	Char(150)	Left Justified.	N/A
	Person_address_t.line_3_addr			
Address Line 4	Outputs the data entered in address line 4.	Char(150)	Left Justified.	N/A
	Person_address_t.line_4_addr			
Address Line 5	Outputs the data entered in address line 5.	Char(150)	Left Justified.	N/A
	Person_address_t.line_5_addr			
	Outputs the data entered in the city, state and zip code fields.	Char(150)	Left Justified.	N/A

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
zip code	See the Common Use Case Components, Algorithms, City, State and Zip format. Person_address_t.city_name, person_address_t.state_code and person_addresses_t.zip_code			
Country Name	Outputs the country name.	Char(150)	Left Justified.	N/A
	Countries_t.country_name (foreign key to Person_address_t.country_seq_num)			
Phone Number	Outputs the phone number.	Char(100)	Left Justified.	N/A
	Person_address_t.phone_num			
Phone Extension	Outputs the phone extension.	Char(25)	Left Justified.	N/A
	Person_address_t.phone_extension_num			
Alternate Phone Number	Outputs the alternate phone number.	Char(100)	Left Justified.	N/A
	Person_address_t.alternate_phone_num			
Alternate Phone Number Extension	Outputs the alternate phone number extension.	Char(25)	Left Justified.	N/A
	Person_address_t.alternate_phone_extension_num			
FAX Number	Outputs the FAX Number.	Char(100)	Left Justified.	N/A
	Person_address_t.fax_num			
E-Mail Address	Outputs the E-Mail Address.	Char(250)	Left Justified.	N/A
	Person_address_t.email_addr			

3.1.8 Race Data Repeating Elements

A person can have more than one race. The person_races_t table contains the race(s) entered for a person. The racial_ethnic_types_t table contains the valid races for a person. See Common Use Case Components, Data Validation, Racial Ethnic Types.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Person id	Unique identifier for a person.	Number(10)	Required.	N/A
	Person_races_t.person_id			
Race type code	Race of a person.	Number(1)	Required.	N/A
	Person_races_t.race_type_code			

3.1.9 Report Cover and End Sheets Elements

3.1.9.1 Cover Sheets

Report Covers sheets shall list the following items:

1. Report Name
2. Report Number
3. Generated By
4. Date and time the report was generated
5. All parameters and their values

3.1.9.2 End Sheets

Report End Sheets shall center the following information on the end sheet:

1. 'Committee Management'
2. Report Name
3. 'End of Report'

3.1.10 Sys Ids Data Elements

System Ids are displayed through a button on each form.   The pop-up display will show the unique identifiers that are applicable for that screen. The table below lists all of the possible unique identifiers.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Agenda Seq Num	Unique meeting identifier.	Number(6)	Required. Display Only.	N/A
	mrstprsn.agenda_seq_num			
Meeting Roster ID	A unique identifier for the attendee on the roster.	Number(6)	Required. Display Only.	N/A
	Mrtsprsn.meeting_roster_id			
Person ID	A unique identifier for the person record.	Number(6)	Required. Display Only.	N/A
	Mrstprsn.person_id			
Appointment Number	A unique number identifying a committee member.	Number(8)	Not Visible	
	cmte_members_t.appointment_num, meeting_rosters_t.appointment_num			

4. Special Requirements

4.1 Data Validation

4.1.1 Address Type

Address types are currently stored in addr_types_t.   The table below also indicates whether that address type is used in CM.   There are several reports that allow users to select the address type. The table below displays the default address types. Users can select other address types, if applicable.

Address Type Code	Description	Used in CM
BUS	Business Office Address of PI Institution	Yes.
CRR	Courier Express Delivery Address	No.
ERA	ERA Commons maintainted address	No.
HOM	PI Home Office Address	No.
I	Institution where supportee is employed/getting education	No.
LAB	Intramural PI LAB address	No.
MLG	US Postal Service Mailing Address (Rm#, MSC, etc.)	Yes.
PI	Address of a PI of the supplement	No.
RES	Personal Residential Address	Yes.
ROS	Committee Member Roster Address	Yes.
VCH	Alternate mailing address for voucher payment	Yes.
WRK	WRK Employment Address	Yes.

4.1.2 Agenda Classification Codes

Agenda classification codes are also known as agenda codes and are currently stored in the agenda_classification_types_t table.

The acronym column is currently not in the database.

Agenda Code	Acronym	Description
01	GRAPS	Grant applications
02	COPRP	Contract proposals
03	GRCOP	Grant applications and/or proposals
04	PERQS	Personal qualifications and performance, and competence of individual investigators
05	COOPs	Cooperative agreement applications
06	CONR	Concept review
07	LMJRN	Journals as potential titles to be indexed by the National Library of Medicine
08	PGRDC	Program documents
09	OTH	Other

4.1.3 Appointment Type Codes

Appointment type codes are currently stored in the cmte_member_appt_types_t table.

Appointment Type Codes	Acronym	Descripton
01	NEW	New
02	RAP	Reappointment
03	RAS	Reassignment (different role during term of appointment)
04	TRN	Transfer (between committees)
05	EXT	Administrative Extension

4.1.4 Attendee Classification Codes

Attendee classification codes are currently stored in the attendee_classifications_t table.

Attendee Classification Codes	Descripton
M	Outside Opinion/Mail Reviewer
O	Other
R	Regular
T	Teleconference

4.1.5 Attendee Role Codes

Attendee roles are currently stored in the attendee_roles_t table. The acronyms are currently not stored in the database.

Attendee Role Code	Acronyms	Descripton
01	REG	Regular
02	CHR	Chairperson
03	CHRAC	Acting Chair
04	SEP	SEP
05	TMP	Temporary
06	FLX	Flexible
07	EXSEC	Executive Secretary
08	SRA	Scientific Review Administrator
09	DFO	Designated Federal Official
10	GTA	Grants Technical Assistant
11	PRGRP	Program Representative
12	CONRP	Contract Representative
13	GMRP	Grants Management Representative
14	OBV	Observer
15	ORST	Other Review Staff
16	EXO	Ex Officio
17	OTH	Other
18	AHR	Ad Hoc

19	MLRV	Mail Reviewer

4.1.6 Attendee Types

Attendee types are currently stored in the attendee_types_t table.

Attendee Type Code	Descripton
N	Non-Standing Member
S	Committee Staff
O	Other
M	Standing Member
X	Non-Member

4.1.7 Authority to Close Types

Authority to close types are currently stored in the authority_to_close_types_t table.

Authority to Close Types	Description
01	section 552b(c)(6), Title 5 U.S.C., as amended
02	sections 552b(c)(4) and 552b(c)(6), Title 5 U.S.C., as amended
03	section 552b(c)(9)(B), Title 5 U.S.C., as amended
04	sections 552b(c)(4), 552b(c)(6), and 552b(c)(9)(B), Title 5 U.S.C., as amended
05	Other

4.1.8 Ethnicity Types

Ethnicity types are used to validate persons_t.ethnicity_type_code and also provides a code to indicate if the ethnicity_type_code is a minority through the minority_class_code column as shown below:

Ethnicity Type Code	Minority Class Code	Description
H	Y	Hispanic/Latino
N	N	Non-Hispanic
U	N	Unknown (Not Reported)
W	N	Intentionally Withheld

4.1.9 Fed Emp Code

Fed Emp codes are currently not stored in a table.

Serving as Fed Emp	Descripton
Y	Yes

N	No

4.1.10 Fed Emp Type

Federal Employee types are currently stored in the fed_emp_types_t table.

Fed_Emp_Type_codes	Descripton
FTP	Full Time Permanent
FTT	Full Time Temporary
PTP	Part Time Permanent
PTT	Part Time Temporary

4.1.11 Federal Staff Types

Federal staff types are currently stored in the fed_staff_types_t table.

Federal Staff Type Code	Description
B	IRG CHIEF
C	Committee Management Officer (CMO)
D	Designated Federal Official
E	Executive Secretary
F	Federal Official
G	Grants Technical Assistant
I	Institute Contact
O	Other
R	Referral Officer/Assistant Chief
S	Scientific Review Administrator
V	Voucher Billing

4.1.12 Meeting Access Types

Meeting access types are currently stored in the meeting_access_types_t table.

Meeting Access Type Code	Description
01	Open
02	Closed
03	Partially Closed

4.1.13 Meeting Classification Codes

Meeting classification codes are also know as meeting formats and are currently stored in the meeting_classifications_t table.

Meeting Classification	Description

Codes	
M	Mail Review
O	Other
R	Regular
S	Site Visit
T	Teleconference
V	Virtual Meeting

4.1.14 Meeting Explanation Codes

Meeting explanation codes are currently stored in the meeting_explanations_t table.

Meeting Explanation Codes	Description
1	Non-CSR other group
2	Non-CSR other group
A	Area
B	SBIR
C	Conflict other than member
F	Overflow
I	Initiatives (Concept review code)
L	Fellowship
M	Member conflict
P	Any P activity code
Q	Lack of quorum
R	RFA
S	Special
V	Aids, Virology

4.1.15 Meeting Types

The meeting type codes are currently stored in the meeting_types_t table.

Meeting Type Code	Description
C	Concept Review
I	Interview/Reverse site visit
N	Contract
R	Regular
S	Standalone site visit
T	Telephone
W	Combination of R, T, and I
X	Combination of R and T
Y	Combination of I and T
Z	Combination of R and I

4.1.16 Member Type Codes

Member type codes are currently stored in the cmte_member_types_t table.

The unique acronym is currently not stored in the database.

Member Type Codes	Acronym	Unique Acronym	Descripton
01	REG	REG	Regular (not Chair)
02	FLX	FLX	Flexible Member
03	TMP	TMP	Temporary Member
04	SEP	SEP	SEP Member
05	CHR	CHRAP	Chair (appointed, excluding ex officio appointed as Chair)
06	CHR	CHRSL	Chair (not appointed, selected by committee vote)
07	CHR	CHRAC	Acting Chair
08	EXO		Ex Officio
09	EXO	EXOD	Ex Officio Designee
10	EXO	EXOAC	Ex Officio appointed as chair
11	CHR	CHCHR	Chair, designated by Charter
12	AHC	AHC	Ad Hoc
13	TSR	TSR	Temporary Member – Senior Reviewer
14	APM	APM	Assistant Professor Member

4.1.17 Notice Action Types

Notice Action Types are currently stored in the notice_action_types_t table.

Notice Action Type	Descripton
01	New
02	Amend
03	CANCEL

4.1.18 Racial Ethnic Types

Racial ethnic types are used to validate persons_t.race_type_code and also provides a code to indicate if the race_type_code is a minority through the minority_class_code columns shown below.

Race Type Code	Minority Class Code	Description
0	N	Unknown
1	Y	American Indian or Alaskan
2	Y	Asian
3	Y	Black or African American
4	Y	Hispanic or Latino
5	N	White
6	Y	Native Hawaiian or Pacific Isl
7	Y	More than one race
9	N	Intentionally withheld

4.1.19 Reason to Close Types

Reason to close codes are currently stored in the reason_to_close_types_t table.

Reason to Close Code	Description
01	Grant applications
02	Contract proposals
03	Grant applications and/or contract proposals
04	Intramural programs and projects
05	Journals as potential titles to be indexed by the National Library of Medicine
06	Program documents - PAC
07	Other

4.1.20 Role Sci/Pub

Scientific/Public values are currently not stored in a table.

Role Sci/Pub	Descripton
S	Scientific
P	Public
N	Not Applicable
Null	Null

4.1.21 Serving as Fed Emp

Serving as Fed Emp values are currently not stored in a table.

Serving as Fed Emp	Descripton
Y	Yes
N	No

4.1.22 Travel Type / Meeting Travel Type

Travel type values are currently not stored in a table.

Travel Type Codes	Descripton
O	Other
T	Member Paid by Travel Order
V	Member Paid by Claim for Reimbursement/Voucher

4.2   Algorithms

4.2.1   Acronym

A meeting identifier can consist of up to five different elements. Those elements are the acronym, flex code, SRA Org, SRA Desig and group code.   If any of those elements are present, they are concatenated together as described below.   An acronym is required, so that element is always present and is the first element in the meeting identifier.

1. If a flex code exists, format as acronym + '-' + flex code. Example, AA-1.

2. If an SRA Org exists, append a space to the acronym as concatenated above then append the SRA Org. Example, AA-1 ABD.

3. If an SRA Desig exists and the SRA Org exists, append a dash ('-') to acronym as concatenated above then append the SRA Desig.   Example, AA-1 ABD-B.

4. If the SRA Org does not exist, append a space to the acronym as concatenated above then append the SRA Desig. Example, AA-1 B.

If a group code exists, append a space, then a '(' to the acronym as concatenated above, then the group code, then a ')'. Example, AA-1 ABD-B (01).

4.2.2   Agenda Code Text

Required for agenda classification code equal to Other (agenda_classification_types_t.agenda_classification_code = '09'). Cleared/display only for all other values.

4.2.3   City, State and Zip format

The city, state and zip code should be formatted as follows: "city, ST 99999-9999". See the cmrptlib.pll get_city_state_zip_func for proper formatting.

4.2.4   Coded Expertise Exists

This function is used to indicate if coded expertise exists. It will return an '*' if the data is missing.

Coded expertise exists if the person_id is found in the person_expertises_t table.

4.2.5   Committee Versions

Versions of committees are tracked in the system. Versions are almost always filtered out. Currently this is implemented through a recursive relationship on the cmtes_t table through the primary key cmte_id and the foreign key version_cmte_id.

To find a parent committee ensure that the version_cmte_id is null.

To find versions of a committee, locate all records where the version_cmte_id is equal to the cmte_id of interest.

4.2.6 Degree Exists

A flag to indicate if the attendee has one or more degrees in person_degs_t. 'Y' indicates at least one degree exists and an astersk ('*') indicates no degrees exist where meeting_rosters_t.person_id = person_degs_t.person_id.

4.2.7 Degree Formatting

If degrees exist, append the degrees found in the role level record after the name. The degree should be separated by commas. The cmlibrpt.pll library has a get_cm_deg_func function that appends the degrees.

4.2.8 Ethnicity Flag

See Data Validation for Ethnicity Types. The system sets this field to 'Y' if the ethnicity_types_t.minority_class_code is 'Y'. Otherwise the field is set to blank.

Only users with the role "PERSON_UNRESTRICTED_ROLE' can display this field. If the user doesn't have this role or the data is missing, the field is set to an asterisk ('*').

4.2.9 Female Flag

If the persons_t.gender_code is 'F' this field is set to 'Y', otherwise it is set to null where meeting_rosters_t.person_id = persons_t.person_id.

Only users with the role "PERSON_UNRESTRICTED_ROLE' can display this field. If the user doesn't have this role, the field is set to an asterisk ('*').

4.2.10 Force Upper Case

Several CM reports allow users to specify whether the output of the report should be in all upper case.   If the force upper case parameter is a 'Y', then output all data elements in upper case.

4.2.11 Get IC CMO Name

The IC CMO of a committee is stored in the cmte_fed_staffs_t table. The IC CMO is identified by the fed_staff_type_code field being equal to "C".   If an IC CMO is the primary IC CMO, the primary_fed_staff_code field will be equal to "Y".   There are date fields that must also be taken into consideration when retrieving data from this table. If the IC CMO is the primary IC CMO, then the primary_fed_staff_start_date and primary_fed_staff_end_date fields must be used to determine the dates

that the IC CMO was serving on this committee. If the primary_fed_staff_code is set to 'N', then the start_date and end_date fields must be used to determine if the IC CMO was serving on this committee.

4.2.12 Get Institution Name

This procedure returns the name of the institution where the attendee is currently employed or most recently employed.

Person employments are stored in the person_employments_t table.   The person is identified by the person_id field. Current employment is identified by the person_employments_t.employment_end_date being null or greater than the SYSDATE.   The primary employment is identified by the person_employments_t.primary_employment_code = 'Y'.   If no primary employment exists, use the most recent employment by ordering the employment by the person_employments_t.employment_start_date DESC.

Employments can be by an external organization (external_org_id), a department within an external organization (dep_ext_org_id), a non-IPF organization (non_ipf_org_id) or within an IC (phs_org_code). Those fields must also be checked to determine which type of employment it is.

To get the name of an external organization (external_org_id), get the external_orgs_t.org_name field using the external_org_id.

To get the name of a non-IPF organization (non_ipf_org_id), get the non_ipf_org_depts._t.org_name field using the non_ipf_org_id.

To get the name of an IC (phs_org_code), get the phs_orgs_t.icd_short_name field using the phs_org_code.

There is a function in comlib.pll to retrieve the primary employment. It is com_cm_a_pkg.get_pri_emp_ext_org_proc.

4.2.13 Get Institution State

To get the state of an external organization (external_org_id), get the external_org_addresses_t.state_code where external_org_addresses_t.addr_type = 'MLG' using the external_org_id field.

To get the state of the IC, get the phs_org_addresses_t.state_code field using the phs_org_code.

4.2.14 Include Ethnicity/Race/Gender

Several CM Reports allow users to specify whether the ethnicity, race and gender should be output on the report. If the Include Ethnicity/Race/Gender parameter is 'Y', then output the respective data elements. See Common Use Case Components, Data Specifications, Person Data Elements and Common Use Case Components, Data Specifications, Race Data Elements.

The data elements are output in the following order:

1. Ethnicity

2. Race

3. Gender

The following business rules apply:

1. The label 'Ethnicity: ' should output before the ethnicity.

2. The label 'Race: ' should output before the race.   If there is more than one race entered for a person, output the next race on the following line, in line with the race from the first line. Do not repeat the label. Continue for all races.

3. The label 'Gender: ' should output before the gender.

4.2.15 Include Phone/Fax/E-Mail

Several CM reports allow users to specify whether the phone, fax and e-mail should be output on the report.   If the Include Phone/Fax/E-mail Parameter is a 'Y', then output the respective data elements. See Common Use Case Components, Data Specifications, Person Address Data Elements.

The data elements are output in the following order:

1. Phone and phone extension

2. Alternate phone and extension

3. Fax

4. E-Mail

If a data element does not exist, do not display a blank line, collapse the line.

The following business rules apply:

1. The label 'Phone: ' should be output before the phone number.   If no phone exists, do not output the label. Collapse the line on the report.

2. If a phone exists, then the label 'Ext: ' should be output before the phone extension and should be on the same line as the phone number. If no extension exists, do not output the label. An extension should not be output if no phone exists.

3. The label 'Alt. Phone: ' should be output before the alternate phone number.   If no alternate phone exists, do not output the label. Collapse the line on the report.

4. If am alternate phone exists, then the label 'Ext: ' should be output before the phone extension and should be on the same line as the phone number. If no extension exists, do not output the label. An extension should not be output if no phone exists.

5. The label 'Fax: ' should be output before the fax number. If no fax exists, do not output the label. Collapse the line on the report.

6. If no e-mail address exists, collapse the line on the report. No label is output for the e-mail address.

4.2.16 Meeting Versions

Meeting versions are tracked in the system through a recursive relationship on the meeting_agendas_t table through the primary key agenda_seq_num and the foreign key version_agenda_seq_num. Versions are always filtered out. A meeting can be New (01), Amended (02), or Cancelled (03) as reflected in the meeting_agendas_t.notice_action_type_code. When a meeting is amended or cancelled, the meeting being amended or cancelled is copied to a new record and the version_agenda_seq_num is set to the agenda_seq_num of the copied meeting. The amendment or cancellation is then entered into the original meeting. This is necessary to preserve the many relationships to the meeting table.

There are 4 possible scenarios that a meeting can have as follows:

1. New Meeting –> No Versions
2. Amended Meeting –> New Meeting Version
3. Cancelled Meeting –> New Meeting Version
4. Cancelled Meeting –> Amended Meeting Version –> New Meeting Version

4.2.17 Name Formatting

1. Format the name in "last name" + ", " + "first name " + " " + "middle name" format. The cmlibrpt.pll library has a get_full_name_func function that properly formats the name.

2. If a suffix exists, append a comma to the name then append the suffix.

4.2.18 Race Flag

See Data Validation for Racial Ethnic Types. The system checks if the racial_ethnic_types_t.minority_class_code is 'Y' and displays the race flag as a 'Y'. Otherwise the race flag is displayed as a blank.

Only users with the role "PERSON_UNRESTRICTED_ROLE' can display this field. If the user doesn't have this role or the data is missing, the field is displayed as an asterisk ('*').

4.2.19 Roster Address Exists

All roster attendees, other than attendee types of Other (meeting_rosters_t.attendee_type_code = 'O') or Committee Staff (meeting_rosters_t.attendee_type_code = 'S'), must have a preferred address (person_addresses_t.preffered_addr_code = 'Y') type 'ROS' (roster) (person_addresses_t.addr_type_code = 'ROS'). 'Y' incidates a preferred roster address exists and an astersk ('*') indicates it doesn't where meeting_rosters_t.person_id = person_addresses_t.person_id. A person can have many addresses but only one needs to meet the above criteria.

4.2.20 Set Err Flag

If the gender code is not in ('M', 'F', 'U') and the attendee type code in ('M', 'N', 'X') then indicate the gender code is missing by displaying an '*' in the gender code column on the form and display a check in the err flag column on the form.

If the ethnicity is null and the attendee type code in ('M', 'N', 'X') then indicate the ethnicity is missing by displaying an '*' in the ethnicity column on the form and displaying a check the err flag column on the form.

If the race is null and the attendee type code in ('M', 'N', 'X') then indicate the race is missing by displaying an '*' in the race column on the form and displaying a check the err flag column on the form.

If there is no preferred roster address and the attendee type code in ('M', 'N', 'X') then indicate the roster address is missing by displaying an '*' in the address column on the form and displaying a check in the err flag column on the form.

If there is no coded expertise and the attendee type code in ('M', 'N', 'X') then indicate the coded expertise is missing displaying an '*' in the expertise column on the form and displaying a check in the err flag column on the form.

If there is no title and the attendee type code in ('M', 'N', 'X') then indicate the title is missing by displaying an '*' in the title column on the form and check the err flag column on the form.

Note that the other columns (SSN, degree and SRA expertise) do indicate the data is missing but do not cause the Err Flag column to display as checked.

4.2.21 Social Security Number (SSN) Flag

System checks persons_t.ssn and displays this field to 'Y' if the SSN field is not blank and '*' otherwise where meeting_rosters_t.person_id = persons_t.person_id.

Only users with the role "PERSON_UNRESTRICTED_ROLE' can display this field. If the user doesn't have this role or the field is missing, the field is displayed as an asterisk ('*').

4.2.22 Subcommittee Identification

Committee affiliations, to include subcommittees, are currently tracked in the cmte_affiliations_t table. For more information on Committee Affiliations see the <<include>> Committee Affiliations use case.

To determine if a committee is a subcommittee, select from cmte_affiliations_t where the to committee ID (to_cmte_id) is equal to the current committee ID (cmte_id) and the affiliation_type_code is equal to 'SUBC' for subcommittee.   If this returns a record, then the parent committee ID can be found in the from committee ID (from_cmte_id) in committee affiliations (cmte_affiliations_t).

4.2.23 Title Exists

This function is used to indicate if a title exists. It will return an '*' if the data is missing.

 A title exists if the persons_t.title field is not null.

4.3   Other Requirements

4.3.1 Report Cover and End Sheets

Report parameter forms shall allow users to specify whether they want to include the report cover and end sheets.   The parameter shall default to 'N' for all reports except the following Federal Register Notices, Expense Ledger Reports and President Annual Reports.

4.3.2 Report Title Editing

Allow users to edit the title of any report.

4.4   Sample Screens

4.4.1   Proposed Meeting Details Screen

4.4.2 Sample Query Federal Staff