Committee Management Use Case Specification: Roster Maintenance

Version 1.9

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REVISION HISTORY

Date	Version	Description of Change	Author
11/19/01	1.0	Initial Version	Carl Newcomer
4/15/02	1.1	Separated Roster Maintenance from Roster use case. Added business rules and screen image.	C Blizard
4/17/02	1.2	Added add attendee business rules.	C Blizard
4/23/02	1.3	Added additional data specs and algorithms. Added activity diagram.	C Blizard
4/25/02	1.4	Updated based on Carl Newcomer's comments. Added checklist algorithm.	C Blizard
4/30/02	1.5	Added Members End Term and OK/Check Complete E-Mail Alert Requirement to other requirements section	C Blizard
5/2/02	1.6	Updated Screen Images with new header/footer	C Blizard
5/3/02	1.7	Added current committee member types to Other Requirements	C Blizard
5/8/02	1.8	1. Added Meeting Expenses Data Specifications 2. Added Deleting a Meeting Attendee Algorithm 3. Removed Upload Status Options 4. Added Algorithm for the Web roster Option 5. Added Membership Statistics to Textual Flow 6. Added Change History Tracking to Other Requirements 7. Updated Activity Diagram 8. Updated based on Al's comments	C Blizard
6/18/02	1.9	Updated document with comments from CDR	K Collie

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1. Brief Description

The Maintain Rosters use case specification describes how to manage roster activities in regard to adding and removing various types of meeting attendees. This use case goes beyond simple requirements for the following reasons:

1. The system is a migration effort from Oracle Forms and as a result the underlying physical design will be used to the fullest extend possible.

2. The user has come to accept many GUI characteristics of the existing system.
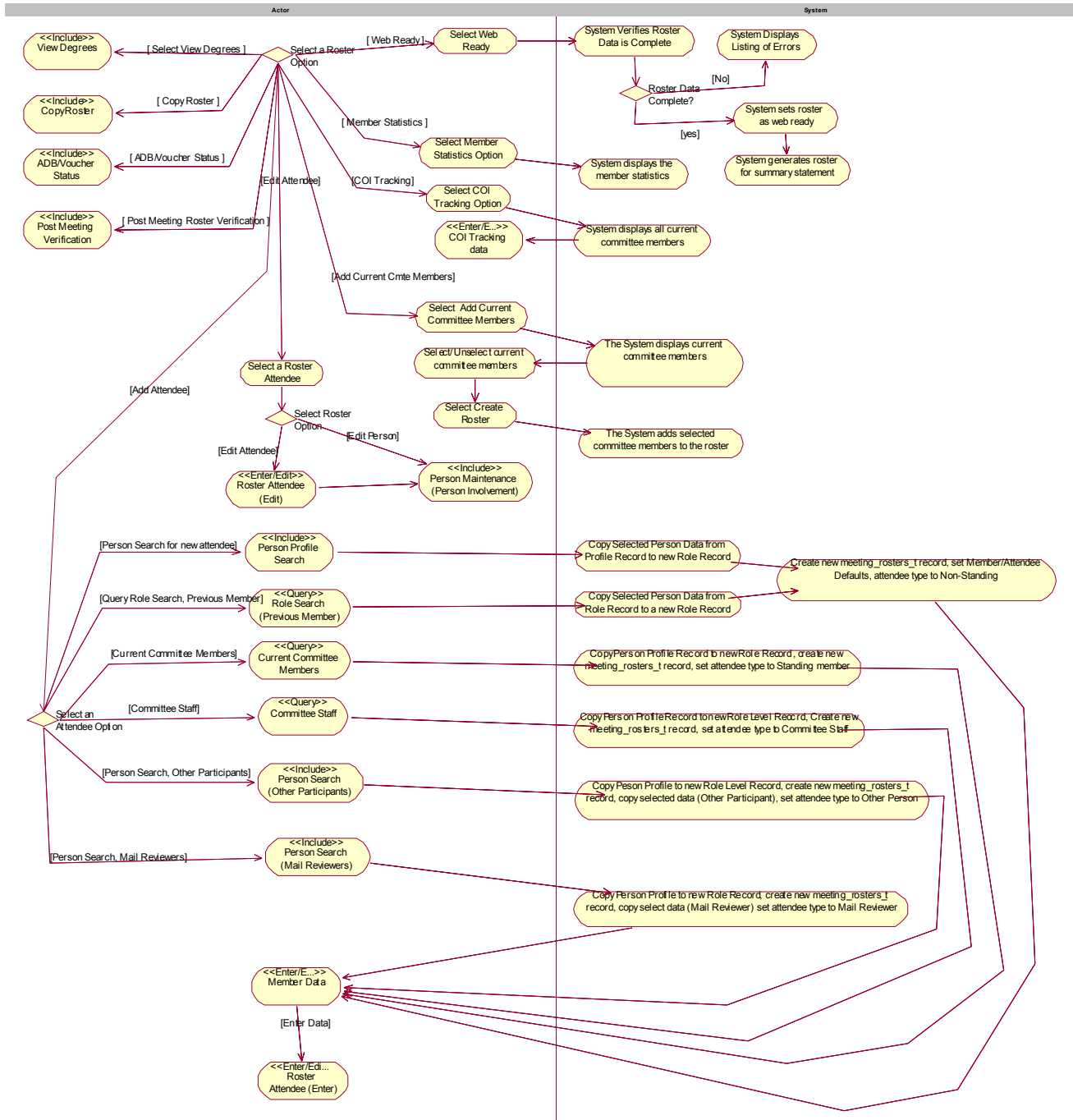
2. Pre-Conditions

Use Case Specification: Maintain Meetings.

3. Flow of Events

3.1 Activity Diagram

3.2   Textual Flow

1.   Access the Roster Maintenance Option.

2.   The system displays the Committee Details Elements (See the Common Use Case Components document Data Specifications), the Meeting Details Elements (See the Common Use Case Components document Data Specifications) and the Roster Details Repeating Elements.

Attendee Setup:

3.   Select a Roster Attendee from the Meeting Roster Repeating Elements. See Roster Maintenance Use Case Meeting Roster Elements.

> Alternative Flows: Upload Flag
>
> Web Roster
>
> Add Meeting Attendee
>
> Add Current Committee Members
>
> Copy Previous Roster
>
> View Degrees
>
> COI Tracking
>
> Post Meeting Verify
>
> Voucher / ADB Status
>
> Member Statistics

4.   <<Enter/Edit>> Edit Meeting Attendee. See Person Elements, Member Elements and Attendee Elements.

> Alternative Flows: <<Include>> Person Involvement
>
> <<Delete>> Attendee
>
> <<Include>> Display System Ids

3.3   Alternative Flows

3.3.1 Upload Flag

Note: This option may be changed due to the Module 71 interface being turned off on June 1, 2002.

1. Select the Upload Flag option.
2. The system verifies the roster data is complete, runs a job to upload the roster to module 71 and runs a job that outputs the roster for the summary statement. See Roster Data Missing Algorithm.

> Alternative flow: Upload Flag Error Listing.

3.3.2 Upload Flag Error Listing

1. The system displays a listing of each roster member and indicates what data is missing for each member.
2. Continue at Attendee Setup Label.

3.3.3 Web roster

1. Select the Web roster Option.
2. The system performs an edit check. See Algorithm Section, Checklist for Finalizing a Roster.
3. The system updates the web roster field to 'Y'.
   Alternate Flow: System displays missing data listing

3.3.4 Person Involvement

1. Select the Person Involvement option.
2. <<Include>> Person Module Use Case (whatever it is).

3.3.5 Copy Roster

1. Select the Copy Previous Roster option.
2. <<Include>> Copy Previous Roster Use Case.
3. Continue at Attendee Setup Label.

3.3.6 View Degrees

1. Select the View Degrees Option.
2. <<Include>> View Degrees Use Case.
3. Continue at Attendee Setup Label.

3.3.7 Post Meeting Verification

1. Select the Post Meeting Verification option.
2. <<Include>> Post Meeting Verification Use Case.

3.3.8 Voucher/ADB Status

1. Select the Voucher/ADB Status Option.
2. <<Include>> Voucher/ADB Status Use Case.

3.3.9 Member Statistics

1. Select the Member Statistics Option.
2. The system displays the Member Statistics Data Elements. See the Common Use Case Components, Member Statistics Data Elements.

3.3.10 Display System Ids

1. See Common Components Use Case.

3.3.11 Add Meeting Attendee

1. Select the Add Meeting Attendee option.

2. The system displays the Committee Details Elements (See Common Use Case Components), Meeting Details Elements (See Common Use Case Components), Person Data Elements, Member Type Codes, Attendee Classification Codes, Attendee Role Types, Attendee Types and Internal Comments Element.

3. Select the Profile Search (non-standing member) option.

    Alternative Flows: Role Search (non-standing member)

                                         Current Cmte Member

                                         Cmte Staff (SRA, GTA, CMO, etc.)

                                         Other Participants (Public observer)

                                         Mail Reviewer

4. <<include>> Person Search.

5. The system sets the Attendee Type Code to 'N' (attendee_type_code = 'N') for non-standing member and permits entry in the Member Elements.

6. Complete the remainder of the form and submit.

7. Continue with Attendees Setup label.

3.3.12 Add Current Cmte Members

1. Select the Add Current Cmte Members option.

2. The system displays a screen listing all active committee members (standing).   See Add Current Committee Members screen sample.

3. Select the Select All option.

    Alternative Flow: Select / Unselect Current Committee Members

4. The system populates the meeting roster with active committee members, ensuring that existing current members on the roster are not duplicated, for the selected committee and refreshes the Meeting Roster Repeating Elements.

5. Continue with Attendees Setup label.

3.3.13 Select / Unselect Current Committee Members

1.   Select or unselect current committee members.

2.   Select the Save option.

            Alternative Flow: Cancel option.

3.   Return to Add Current Cmte Members, step 4.

3.3.14 Add Role Search (non-standing member)

1.   Select the Role Search option. (This button was previous called Previous Member.)

2.   <<Query>> Non-Standing Members. See Previous Member Repeating Elements.

3.   The system populates the Previous Member Repeating Elements.

4.   Select a member from the queried list and submit the form.

5.   The system creates a copy of the select person information to include addresses, degrees, expertise, and employment and displays the person information in the Person Elements; the system populates the Member Elements with values from the selected record and sets the proposed start/end date to the meeting start/end date; and the system sets the Attendee Type Code to 'N' (attendee_type_code = 'N') for non-standing member.

6.   Complete the remainder of the form and submit.

7.   Continue with the Attendees Setup label.

3.3.15 Current Cmte Member

1.   Select the Current Cmte Member option.

2.   The system displays a list of active members. See Current Member Repeating Elements.

3.   Select a member from the list and submit the form.

4.   The system populates the Person Elements (for view only; no additional person information is created) and Member Elements with values from the selected record and locks the Member Elements from change (view only) and sets the Attendee Type Code to 'M' (attendee_type_code = 'M') for standing member.

5.   Complete the remainder of the form and submit.

6.   Continue with the Attendees Setup label.

3.3.16 Add Committee Staff (SRA, GTA, CMO, etc.)

1.   Select the Committee Staff option.

2.   The system displays a list of active Committee Staff. See Common Use Case Components, Data Specification, Committee Staff Repeating Elements.

     Alternative Flows:<<Query>> Committee Staff (this is really a filter if the list is large).

3. Select a Committee Staff person from the list and submit the form.

4. The system populates the Person Elements (for view only; no additional person information is created) and clears and locks the Member Elements from change (view only) and sets the Attendee Type Code to 'S' (attendee_type_code = 'S') for federal staff.

5. Complete the remainder of the form and submit.

6. Continue with the Attendees Setup label.

3.3.17 Other Participant (Public observer)

1. Select the Other Participant option.

2. <<include>> Person Search.

3. The system populates the Person Elements with values passed from the Person Search and clears and locks the Member Elements from change (view only) and sets the Attendee Type Code to 'O' (attendee_type_code = 'O') for other public person.

4. Complete the remainder of the form and submit.

5. Continue with the Attendees Setup label.

3.3.18 Mail Reviewer

1. Select the Mail Reviewer option.

2. <<include>> Person Search.

3. The system populates the Person Elements with values passed from the Person Search and clears and locks the Member Elements from change (view only) and sets the attendee role to (18) for Mail Reviewer, Attendee Class to (M) for Outside Opinion/Mail Reviewer and the Meeting Travel Type to (T) for travel order.

4. Complete the remainder of the form and submit.

5. Continue with the Attendees Setup label.

3.3.19 COI Tracking

1. Select the COI Tracking Option
2. <<Enter/Edit>> COI Tracking
3. Submit the Form.

3.3.20 Sys Id's

3.3.21

1. Select the Sys ID's option

2. The system displays the relevant system ID's. See Data Specifications, System Ids Data Elements.

3.4   Data Specifications

3.4.1 Roster Data Repeating Elements

The roster repeating elements are stored in the mrst_prsn view.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Sel	Allows user to select or unselect a meeting attendee.	Checkbox	Optional.	N/A
	N/A			
Err	Indicates if the meeting attendee is missing any required data for the roster.	Checkbox	Display Only.	N/A
	N/A			
Name	Name of meeting attendee.	Character(25). Last Name, First Name, Middle Initial	Display Only.	N/A
	Mrst_prsn.last_name, mrst_prsn.first_name, mrst_prsn.mi_name			
Type	Indicates the type of the attendee, i.e., Standing Member, Non-Standing Member, etc.	Char(1)	Display Only.	N/A
	Mrst_prsn.attendee_type_code			
Attendee Role Code	Indicates the role of the attendee, i.e., Chair, GM Rep, etc.	Char(2)	Display Only.	N/A
	attendee_roles_t.descrip (mrst_prsn.attendee_role_code)			
Class	Indicates the classification of the attendee, i.e., Regular, etc.	Char(10)	Display Only.	N/A
	Mrst_prsn.attendee_classification_code			
State	The state where the institution is located.	Char(2)	Display Only.	N/A
	See "Common Use Case Components, Algorithms, Get Institution State".			
Institution	The institution where the attendee is employed.	Char(20)	Display Only.	N/A
	See "Common Use Case Components, Algorithms, Get Institution Name".			

Element name	Description	Formatting	Edits	Data Conversion
Table/Column Name				
Title	Indicates if the title has been entered.	Char(1)	Display Only, {* - missing data Y – data present}	N/A
	See "Common Use Case Components, Algorithms, Title Exists".			
Ros	Indicates if the preferred roster address has been entered.	Char(1)	Display Only, {* - missing data, Y – data present)	N/A
	See "Common Use Case Components, Algorithms, Roster Address Exists".			
Deg	Indicates if a degree has been entered.	Char(1)	Display Only, {* - missing data, Y – data present}	N/A
	See "Common Use Case Components, Algorithms, Degree Exists".			
Eth	Indicates if ethnicity has been entered.	Char(1)	Display Only, { - missing data, Y – data present}	N/A
	See "Common Use Case Components, Algorithms, Ethnicity Flag".			
Race	Indicates if race information has been entered.	Char(1)	Display Only, {* - missing data, Y – attendee is a minority}	N/A
	See "Common Use Case Components, Algorithms, Race Flag".			
Fem	Indicates if gender information has been entered.	Char(1)	Display Only, {* - missing data, Y – indicates the person is a female}	N/A
	See "Common Use Case Components, Algorithms, Female Flag".			
SSN	Indicates if the social security number has been entered.	Char(1)	Display Only, {* - missing data, Y – data present}	N/A
	See "Common Use Case Components, Algorithms, SSN Flag".			
Coded Exp	Indicates if the coded expertise has been entered.	Char(1)	Display Only, {* - missing data, Y – data present}	N/A
	See "Common Use Case Components, Algorithms, Coded Expertise Exists".			

3.4.2 Person Data Elements

Persons are currently stored in the persons_t table. The Person elements are not editable due to the complex nature of setting up meeting roster attendees.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Person Involvement Option	Select this option to edit information about the person. To edit person information on an existing roster attendee, the Person Involvement Option is available which is explained in the <<include>> Person Maintenance. After returning from the <<include>> Person Maintenance the fields are updated with any changes.			
Person ID	System-generated number that uniquely identifies a person.	Number(10)	Display Only	N/A
	meeting_rosters_t.person_id (foreign key from persons_t)			
SSN Option	Press this button to toggle display of the SSN on and off.			
SSN	Social security number of the selected person. Char(9),	999-99-9999, Hidden by default, only users with the role "PERSON_ UNRESTRICTED_ROLE' can display this field.	Display Only	N/A
	persons_t.ssn			
Last Name	Last name of the selected person.	Char(30)	Display Only	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			
Suffix	Name suffix of the selected person.	Char(5)	Display Only	N/A
	persons_t.name_suffix			

3.4.3 Member Data Elements

Member elements are currently stored in the cmte_members_t table. The Member Elements are handled differently depending on the type of the meeting roster attendee as follows:

Member Data Validation Table		
Roster Attendee Type	**Add**	**Edit**
Standing Member ('M')	Display Only, Populate fields from committee member information.	Display Only, Populate fields from committee member information.
Non-Standing Member ('N')	Updateable	Updateable
Non-Member ('X')	Display Only, Do not populate member data elements	Display Only, Do not populate member data elements
Committee Staff ('S')	Display Only, Do not populate member data elements	Display Only, Do not populate member data elements
Other ('O')	Display Only, Do not populate member data elements	Display Only, Do not populate member data elements

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Appointment Type Code	A code defining the type of appointment.	Char(2)	Required.	N/A
	Cmte_member_appt_types_t.appointment_type_acronym (cmte_members_t.appointment_type_code foreign key from cmte_member_appt_types_t)			
Member Type Code	A code designating member's actual role on the committee.	Char(2)	Required, (See above Member Data Validation Table), See Data Validation for Committee Member Types.	N/A
	cmte_members_t.member_type_code (foreign key from cmte_member_types_t)			
Member Type Acronym	An acronym of members actual role on the committee.	Char(3)	Display Only, (See above Member Data Validation Table), See Data Validation for Committee Member Types.	N/A
	cmte_member_types_t.member_type_acronym			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Proposed Start Date	The proposed start date of the requested appointment (mm/dd/yyyy).	Date, mm/dd/yyyy	Required, (See above Member Data Validation Table), Proposed Start Date must be between the Meeting Start/End Date and must be less than or equal to the Proposed End Date.	N/A
	cmte_members_t.proposed_start_date			
Proposed End Date	The proposed termination date of the requested appointment (mm/dd/yyyy).	Date, mm/dd/yyyy	Required, (See above Member Data Validation Table), Proposed End Date must be between the Meeting Start/End Date and must be greater than or equal to the Proposed Start Date.	N/A
	cmte_members_t.proposed_end_date			
Actual Start Date	Actual beginning date of appointment period (mm/dd/yyyy).	Date, mm/dd/yyyy	Optional, (See above Member Data Validation Table), Actual Start Date must be between the Meeting Start/End Date and must be less than or equal to the Actual End Date.	N/A
	cmte_members_t.actual_start_date			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Actual End Date	Date member's term ends (mm/dd/yyyy).	Date, mm/dd/yyyy	Optional, (See above Member Data Validation Table), Start End Date must be between the Meeting Start/End Date and must be greater than or equal to the Actual Start Date.	N/A
	cmte_members_t.actual_end_date			
Scientific/Public Code	A code identifying the position as Scientific or Public.	Char(1)	Required, {'S' – Scientific (Default), 'P' – Public, 'N' – Not Applicable}, (See above Member Data Validation Table)	N/A
	cmte_members_t.sci_public_code			
Serving as Federal Employee Code	A code designating if nominee is serving as a Federal Employee.	Char(1)	Required, {'Y' – Yes, 'N' – No}, (See above Member Data Validation Table)	N/A
	cmte_members_t.serving_as_fed_emp_code			
Travel Type Code	Method of reimbursement for travel expenses.	Char(1)	Required, (See above Member Data Validation Table), See Data Validation for Committee Member Travel Types	N/A
	cmte_members_t.travel_type_code			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Federal Employee Code	A code designating if the nominee is a Federal Employee.	Char(1)	Required, {'Y' – Yes, 'N' – No}, (See above Member Data Validation Table)	N/A
	cmte_members_t.fed_emp_code			
Federal Employee Type Code	Code distinguishing permanent or temporary federal employment.	Char(3)	Optional, (See above Member Data Validation Table), See Data Validation for Federal Employee Types	N/A
	cmte_members_t.fed_emp_type_code			
Committee ID	A system-generated unique number assigned to each Committee.	Number(6)	Not Visible	N/A
	cmte_members_t.cmte_id			

3.4.4 Attendee Data Elements

Meeting attendee elements are based on the meeting_rosters_table. This table tracks the person information through the foreign key meeting_rosters_t.person_id, committee membership through the foreign key meeting_rosters_t.appointment_num, and the core meeting roster elements.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Appointment Number	A unique number identifying a committee member.	Number(8)	Not Visible	N/A
	meeting_rosters_t.appointment_num (foreign key from cmte_members_t)			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Appointment Type Code	A code defining the type of appointment.	Char(2)	Required, (See above Member Data Validation Table) See Data Validation for Committee Member Appointment Types.	N/A
	cmte_members_t.appointment_type_code (foreign key from cmte_member_appt_types_t)			
Appointment Type Acronym	An acronym of the type of appointment.	Char(3)	Display Only, (See above Member Data Validation Table) See Data Validation for Committee Member Appointment Types.	N/A
	cmte_member_appt_types_t.appointment_type_acronym			
Member Type Code	A code designating member's actual role on the committee.	Char(2)	Required, (See above Member Data Validation Table), See Data Validation for Committee Member Types.	N/A
	cmte_members_t.member_type_code (foreign key from cmte_member_types_t)			
Member Type Acronym	An acronym of members actual role on the committee.	Char(3)	Display Only, (See above Member Data Validation Table), See Data Validation for Committee Member Types.	N/A
	cmte_member_types_t.member_type_acronym			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Proposed Start Date	The proposed start date of the requested appointment (mm/dd/yyyy).	Date, mm/dd/yyyy	Required, (See above Member Data Validation Table), Proposed Start Date must be between the Meeting Start/End Date and must be less than or equal to the Proposed End Date.	N/A
	cmte_members_t.proposed_start_date			
Proposed End Date	The proposed termination date of the requested appointment (mm/dd/yyyy).	Date, mm/dd/yyyy	Required, (See above Member Data Validation Table), Proposed End Date must be between the Meeting Start/End Date and must be greater than or equal to the Proposed Start Date.	N/A
	cmte_members_t.proposed_end_date			
Actual Start Date	Actual beginning date of appointment period (mm/dd/yyyy).	Date, mm/dd/yyyy	Optional, (See above Member Data Validation Table), Actual Start Date must be between the Meeting Start/End Date and must be less than or equal to the Actual End Date.	N/A
	cmte_members_t.actual_start_date			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Actual End Date	Date member's term ends (mm/dd/yyyy).	Date, mm/dd/yyyy	Optional, (See above Member Data Validation Table), Start End Date must be between the Meeting Start/End Date and must be greater than or equal to the Actual Start Date.	N/A
	cmte_members_t.actual_end_date			
Scientific/Public Code	A code identifying the position as Scientific or Public.	Char(1)	Required, {'S' – Scientific (Default), 'P' – Public, 'N' – Not Applicable}, (See above Member Data Validation Table)	N/A
	cmte_members_t.sci_public_code			
Serving as Federal Employee Code	A code designating if nominee is serving as a Federal Employee.	Char(1)	Required, {'Y' – Yes, 'N' – No}, (See above Member Data Validation Table)	N/A
	cmte_members_t.serving_as_fed_emp_code			
Travel Type Code	Method of reimbursement for travel expenses.	Char(1)	Required, (See above Member Data Validation Table), See Data Validation for Committee Member Travel Types	N/A
	cmte_members_t.travel_type_code			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Federal Employee Code	A code designating if the nominee is a Federal Employee.	Char(1)	Required, {'Y' – Yes, 'N' – No}, (See above Member Data Validation Table)	N/A
	cmte_members_t.fed_emp_code			
Federal Employee Type Code	Code distinguishing permanent or temporary federal employment.	Char(3)	Optional, (See above Member Data Validation Table), See Data Validation for Federal Employee Types	N/A
	cmte_members_t.fed_emp_type_code			
Committee ID	A system-generated unique number assigned to each Committee.	Number(6)	Not Visible	N/A
	cmte_members_t.cmte_id			
Internal Comments	Internal_comments	Char(500)	Optional.	N/A
	meeting_rosters_t.internal_comments			

3.4.5 Role Search (Previous Member) Data Elements

Previous Member Repeating Elements is currently retrieving information from the cmte_cmem_prsn view. It is primarily used to identify an existing member, standing or non-standing, to select for the current meeting roster. This process is primary used to identify a person from which to copy the person information, degrees, expertise, addresses, and employments in addition to pre populating some of the Member data in the Member Elements above. Since this list can be quite large, the user is presented with a blank screen currently from which they can create a query for identifying a member. See Algorithms for Previous Member Option for more details on the detail business logic.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Name Column			
Last Name	Last name of the selected person.	Char(30)	Queryable	N/A

Element name	Description	Formatting	Edits	Data Conversion
	Table/Name Column			
	cmte_cmem_prsn.last_name			
First Name	First name of the selected person.	Char(30)	Queryable	N/A
	cmte_cmem_prsn.first_name			
Middle Name	Middle name of the selected person.	Char(30)	Queryable	N/A
	cmte_cmem_prsn.mi_name			
Start Date	Beginning date of appointment period.	Date, mm/dd/yyyy	Queryable, See Algorithm for Previous Member Search	Set to Actual Start Date if not null, otherwise set to Proposed Start Date
	cmte_cmem_prsn.proposed_start_date			
End Date	Date member's term ends.	Date, mm/dd/yyyy	Queryable, See Algorithm for Previous Member Search	Set to Actual End Date if not null, otherwise set to Proposed End Date
	cmte_cmem_prsn.proposed_end_date			
Appointment Type Code	A code defining the type of appointment	Char(2)	Not Visible	N/A
	cmte_cmem_prsn.appointment_type_code (foreign key from cmte_member_appt_types_t)			
Appointment Type Acronym	An acronym of the type of appointment.	Char(3)	Queryable	N/A
	cmte_member_appt_types_t.appointment_type_acronym			
Member Type Code	A code designating member's actual role on the committee.	Char(2)	Not Visible	N/A
	cmte_cmem_prsn.member_type_code (foreign key from cmte_member_types_t)			
Member Type Acronym	An acronym of members actual role on the committee.	Char(3)	Queryable	N/A
	cmte_member_types_t.member_type_acronym			
Committee Acronym	A unique acronym for the committee.	Char(6)	Queryable	N/A
	cmte_cmem_prsn.nih_abbr_code			
State	Derived element. State code of the attendee.	Char(2)	Display Only, .	N/A

Element name	Description	Formatting	Edits	Data Conversion
	Table/Name Column			
	See Algorithm for Employment Institution/State			
Institution	Derived element. Name of institution.	Char(40)	Display Only, See Algorithm for Employment Institution/State.	N/A
	N/A			
Minority	Derived element. A flag to indicate if the attendee is a minority.	Char(1)	Display Only, See Algorithm for Minority Flag	N/A
	N/A			
Female	Derived element. A flag to indicate if the attendee is a female.	Char(1)	Display Only, See Algorithm for Female Flag	N/A
	N/A			
Scientific/Public	Code defining whether the nominee is filling a position designated as a scientific or public member, where applicable.	Char(1)	Display Only	N/A
	cmte_cmem_prsn.sci_public_code			
Serving as Federal Employee	A code designating whether nominee is serving under their federal employment.	Char(1)	Display Only	N/A
	cmte_cmem_prsn.serving_as_fed_emp_code			
Appointment Number	A unique number assigned to each nomination record when the initial ICD hold is placed.	Number(8)	Display Only	N/A
	cmte_cmem_prsn.appointment_num			

3.4.6 Current Committee Member (Standing Member) Data Elements

Standing Member Repeating Elements is currently retrieving information from the cmte_cmem_prsn view for the current committee where the member type code is '01', '02', '05', '06', '08', '09', or '10' (these member type codes are considered standing members) and the member's actual start date is less than or equal to the end date of the meeting and the member's actual end date is null or greater than or equal to the meeting start date. The system must ensure that the standing member being selected is not currently already on the meeting roster.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Appointment Type Code	A code defining the type of appointment	Char(2)	Not Visible	N/A
	cmte_cmem_prsn.appointment_type_code (foreign key from cmte_member_appt_types_t)			
Member Type Code	A code designating member's actual role on the committee.	Char(2)	Not Visible	N/A
	cmte_cmem_prsn.member_type_code (foreign key from cmte_member_types_t)			
Member Type Acronym	An acronym of members actual role on the committee.	Char(3)	Display Only	N/A
	cmte_member_types_t.member_type_acronym			
Last Name	Last name of the selected person.	Char(30)	Display Only	N/A
	cmte_cmem_prsn.last_name			
First Name	First name of the selected person.	Char(30)	Display Only	N/A
	cmte_cmem_prsn.first_name			
Middle Name	Middle name of the selected person.	Char(30)	Display Only	N/A
	cmte_cmem_prsn.mi_name			
Actual Start Date	Actual beginning date of appointment period.	Date, mm/dd/yyyy	Display Only	N/A
	cmte_cmem_prsn.actual_start_date			
Actual End Date	Actual date member's term ends.	Date, mm/dd/yyyy	Display Only	N/A
	cmte_cmem_prsn.actual_end_date			
State	Derived element. State code of the attendee.	Char(2)	Display Only, See Algorithm for Employment Institution/State.	N/A

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
	N/A			
Institution	Derived element. Name of institution.	Char(60)	Display Only, See Algorithm for Employment Institution/State.	N/A
	N/A			
Minority	Derived element. A flag to indicate if the attendee is a minority.	Char(1)	Display Only, See Algorithm for Minority Flag	N/A
	N/A			
Female	Derived element. A flag to indicate if the attendee is a female.	Char(1)	Display Only, See Algorithm for Female Flag	N/A
	N/A			
Scientific/Public	Code defining whether the nominee is filling a position designated as a scientific or public member, where applicable.	Char(1)	Display Only	N/A
	cmte_cmem_prsn.sci_public_code			
Serving as Federal Employee	A code designating whether nominee is serving under their federal employment.	Char(1)	Display Only	N/A
	cmte_cmem_prsn.serving_as_fed_emp_code			
Appointment Number	A unique number assigned to each nomination record when the initial ICD hold is placed.	Number(9)	Display Only	N/A
	cmte_cmem_prsn.appointment_num			

3.4.7 COI Tracking Data Elements

Currently, COI Tracking is stored in the coi_trackings_t table. This table will be restructured to fit current needs of the users.   On 4/22/02, the coi_trackings_t table has 88 records in the production instance.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Sel	Allows user to select/unselect for viewing system id's.	Checkbox.	Optional.	N/A
	N/A			
Name of Member	Last name, First Name of member.	Char(40)	Display Only.	N/A
	Persons_t.last_name, persons_t.first_name (meeting_rosters_t.person_id foreign key to persons_t.person_id)			
Date Sent to Member	Date that the COI form was sent to the member.	Date	Optional.	N/A
	Coi_trackings_t.sent_date			
No New Waiver or Addendum Needed	Indicates no new waiver or addendum is needed.	Char(1)	Optional.	N/A
	Coi_trackings_t.waiver_needed			
New Waiver or Addendum Attached	Indicates the waiver or addendum is attached	Char(1)	Optional.	N/A
	Coi_trackings_t.waiver_attached			
Waivers Sent to OSCE	Indicates the waiver was sent to OSCE	Char(1)	Optional.	N/A
	Coi_trackings_t.waiver_sent			
Comments	Comment field.	Char(120)	Optional.	N/A
	Coi_trackings_t.comment			

3.4.8 Meeting Expenses Data Elements

When an attendee is added to a roster, the voucher record must be created. Vouchers are currently stored in the meeting_expenses_t table.   The following table describes which fields should be populated and how to populate them.

Meeting_expenses_t column name	Populate value from
Meeting_roster_id	Meeting_agendas_t.meeting_roster_id
Supplement_id_seq_num	0
Phs_org_code	Cmtes_t.phs_org_code where meeting_agendas_t.cmte_id = cmtes_t.cmte_id
Nih_abbr_code	Cmtes_t.nih_abbr_code where meeting_agendas_t.cmte_id = cmtes_t.cmte_id
Form_1099_required_code	If persons_t.ssn is NULL then NULL, otherwise 'Y'. (where meeting_agendas_t.person_id = persons_t.person_id)
Adb_order_num	The system should auto generate an ADB travel order number if the (cmte_members_t.member_type_code is (01, 02, 03, 04, 05, 12) AND the cmte_members_t.fed_emp_code = 'Y') OR (cmte_members_t.serving_as_fed_emp = 'Y' and cmte_members_t.member_type_code is (08, 09, 10, 11)
appl_id	Meeting_agendas_t.appl_id
gsa_max_lodging_amt	Meeting_agendas_t.gsa_max_lodging_amt, if null, then get the default value from impacii_system_parameters_t.var_value_text where var_name = 'GSA_MAX_LODGING_AMT'
gsa_max_mie_amt	Meeting_agendas_t.gsa_max_mie_amt, if null, then get the default value from impacii_system_parameters_t.var_value_text where var_name = 'GSA_MAX_MIE_AMT'
gsa_rate_air_amt	Meeting_agendas_t.gsa_rate_air_amt, if null, then get the default value from impacii_system_parameters_t.var_value_text where var_name = 'GSA_MAX_AIR_AMT'
gsa_rate_auto_amt	Meeting_agendas_t.gsa_rate_auto_amt, if null, then get the default value from impacii_system_parameters_t.var_value_text where var_name = 'GSA_MAX_AUTO_AMT'

gsa_rate_motorcycle_amt	Meeting_agendas_t.gsa_rate_motorcycle_amt, if null, then get the default value from impacii_system_parameters_t.var_value_text where var_name = 'GSA_MAX_MOTORCYCLE_AMT'
consultant_fee_amt	Meeting_agendas_t.consultant_fee_amt, if null, then get the default value from impacii_system_parameters_t.var_value_text where var_name = 'CONSULTANT_FEE_AMT'.

3.4.9 Member Statistics Data Elements

See Common Use Case Components, Data Specifications, Member Statistics

3.5   Post-Conditions

Roster maintenance is complete.

3.6   Special Requirements

3.6.1 Data Validation

None.

3.6.2 Algorithms

3.6.2.1 Roster Data Complete Algorithm

The system will display asterisks in several fields if data is missing. If that data is required for the roster to be complete, the Err box will also be checked. If these rules are not met at the time the Upl Flag box is checked, the roster will not be uploaded and the system will display a message to the user.

If the meeting is a FACA or Non-FACA meeting for an IRG or SEP committee AND the attendee type is Standing, Non-Standing or Non-Member we will display an asterisk in the following fields if the data is missing:

Data	Roster Details Column Name	Valid Data	Elements that are required for Roster to be Uploaded
Title	Title	The title field on the persons role level record cannot be null.	Y
Preferred Roster Address	Ros	A preferred roster address must be on the persons role level record.	Y
Degrees	Deg	At least one degree must be entered on the persons role level record.	N
Ethnicity	Eth	Ethnicity cannot be null on the persons role level record.	Y
Race	Min	At least one race must be entered on the persons role level record.	Y
Gender	Gen	Gender cannot be null on the persons role level record.	Y
Social Security Number	SSN	The social security number cannot be null.	N
Coded Expertise	Coded Exp	At least one coded expertise must be selected on the persons role level record.	Y

3.6.2.2 Web roster Option

The Web roster options shall flag the roster as being ready to display on the web. It shall also generate the roster for the summary. This replaces the client server option of indicating a roster is ready for

upload. Call the function
com_dbms_ss_roster_pkg.create_roster_proc(meeting_agendas_t.agenda_seq_num).   If the roster is
not complete, see the Roster Data Missing Algorithm, the roster will not be marked as complete and will
not be generated for the summary statement. A message will be displayed to the use if the roster is
incomplete.

This function will upload the roster to so that it can be included on the summary statement. This function
will also include an indication that the roster has been uploaded and is now ready to be displayed on the
web.

Other Requirements

3.6.2.3 Enabling / Disabling Add Attendee Options

There are six options for adding an attendee to a meeting.   These options are enabled or disabled based on the committee type. The table below describes when an option is enabled or disabled.

Add Attendee Buttons	FACA or Non-FACA Meetings, by Committee Type		
	IRG	SEP	NAC, PAC, BSC
Profile Search Option	Enabled	Enabled	Enabled
Role Search	Enabled	Enabled	Enabled
Current Cmte Member	Enabled	Disabled	Enabled
Committee Staff	Enabled	Enabled	Enabled
Other Participant	Enabled	Enabled	Enabled
Mail Reviewer	Enabled	Enabled	Enabled

3.6.2.4 Add Attendee Business Rules

There are three categories in which fields for attendees are defaulted. First, there are fields that are always defaulted to a specific value regardless of any other criteria. Second, there are fields that are defaulted based on the meeting classification code. Third, there are fields that are defaulted based on the type of committee and meeting (FACA/Non-FACA).   The fields in these three categories do not overlap. All three categories must be applied for each attendee and are discussed in more detail below.

3.6.2.4.1   Default for Committee Types (IRG, SEP, NAC, BSC & PAC)

If a new appointment record is being created, the following fields are always defaulted to the values indicated below regardless of the committee type or meeting type.

Field	Get Default Value From
Proposed Start Date (cmte_members_t. proposed_start_date)	Meeting start date (meeting_agendas_t.start_date)
Proposed End Date (cmte_members_t. proposed_end_date)	Meeting end date (meeting_agendas_t.end_date)
Actual Start Date (cmte_members_t. actual_start_date)	Meeting start date (meeting_agendas_t.start_date)
Actual End Date (cmte_members_t. actual_start_date)	Meeting end date (meeting_agendas_t.end_date)
Travel Type Code (cmte_members_t.travel_type_code) V = Voucher T = Travel Order O = Other	If the committee is an IRG or a SEP, default to 'V'. If the committee is a NAC, PAC or BSC default to 'T'.
Meeting Travel Type Code (meeting_rosters_t. travel_type_code) T = Travel Order	If the attendee_classification_code is 'M' (mail reviewer) then default to 'T'. If the attendee_type_code is 'S' (Committee Staff) then default to 'T'.

	Otherwise, default to the Travel Type Code (cmte_members_t, travel_type_code) on the appointment record.
Scientific / Public (cmte_members_t.sci_public_code)	Default to 'S'

3.6.2.4.2   Defaults based on Meeting Classification

The meeting classification code does not default for other partipants or committee staff.

If the meeting classification code is (meeting_agendas_t.meeting_classification_code)	The Attendee classification code will default to (meeting_rosters_t.attendee_classification_code)
Regular (R)	Regular (R)
Teleconference (T)	Teleconference (T)
Mail Review (M)	Mail Review (M)
Not Regular (R), Teleconference (T) or Mail Review (M)	Regular (R)

3.6.2.4.3   Profile Search Option Defaults

If the user chooses to begin the creation of a non-standing member for the meeting roster, the <<include>> Person Search will return a Person ID (persons_t.person_id). Once the person ID is known, the system creates a new record in cmte_members_t and performs the following activities:

1.   Set the Person ID foreign keys for the following:
   a.   Person Elements Person ID (persons_t.person_id)
   b.   Member Elements Person ID (cmte_members_t.person_id)
   c.   Attendee Elements Person ID (meeting_rosters_t.person_id)

The system then populates the Person Elements based on the selected Person ID (person_t.person_id).

Field	FACA Meetings, by Committee Type			Non-FACA Workgroups, any Committee Type
	IRG	SEP	NAC, PAC, BSC	
Appointment Type Code (cmte_members_t. appointment_type_code)	'01' (New)	'01' (New)	'01' (New)	'01' (New)
Member Type Code (cmte_members_t. member_type_code)	'03' (TMP). Ability to change to only Ad Hoc.	'04' (SEP). No ability to change.	'12' (Ad Hoc) No ability to change.	'12' (Ad Hoc) No ability to change.
Attendee Type Code (meeting_rosters_t. attendee_type_code)	'N' (Non-Standing Member)	'N' (Non-Standing Member)	'N' (Non-Standing Member)	'X' (Non-Member)
Attendee Role Code (meeting_rosters_t. attendee_role_code)	'05' (Temporary)	'04' for SEP	'05' (Temporary)	'05' (Temporary)

3.6.2.5 Role Search Options

If the user chooses to begin creation of a non-standing member from the Previous Member Elements (Search/Query), the system creates a new record in cmte_members_t and performs the following activities:

1. Ensure that the selected person is not sanctioned (<<include>> ORI Sanctions).
2. Create a copy of the selected member's person information to include degrees, expertise, addresses, and employments.

Field	FACA Meetings, by Committee Type			Non-FACA Workgroups, any Committee Type
	IRG	**SEP**	**NAC, PAC, BSC**	
Appointment Type Code (cmte_members_t. appointment_type_code)	'01' (New)	'01' (New)	'01' (New)	'01' (New)
Member Type Code (cmte_members_t. member_type_code)	'03' (TMP). Ability to change to only Ad Hoc.	'04' (SEP). No ability to change.	'12' (Ad Hoc) No ability to change.	'12' (Ad Hoc) No ability to change.
Attendee Type Code (meeting_rosters_t. attendee_type_code)	'N' (Non-Standing Member)	'N' (Non-Standing Member)	'N' (Non-Standing Member)	'X' (Non-Member)
Attendee Role Code (meeting_rosters_t. attendee_role_code)	'05' (Temporary)	'04' for SEP	'05' (Temporary)	'05' (Temporary)

3.6.2.6 Current Committee Member Search

If the user chooses to begin the selection of a standing member from the Standing Member Elements (Search/Query), the system performs the following activities:

1. Ensure that the selected person is not sanctioned (<<include>> ORI Sanctions).
2. Display the selected member's person information.
3. Display the member (cmte_members_t) in the Member Elements and lock from updates.

Note: A new appointment record is not created for committee members. The meeting_rosters_t record references the existing appointment in the cmte_members_t table. Therefore, the defaults for the cmte_members_t table are not applicable.

Field	FACA Meetings, by Committee Type			Non-FACA Workgroups, any Committee Type
	IRG	**SEP**	**NAC, PAC, BSC**	
Appointment Type Code (cmte_members_t. appointment_type_c ode)	N/A	N/A	N/A	N/A
Member Type Code (cmte_members_t. member_type_code)	N/A	N/A	N/A	N/A
Attendee Type Code (meeting_rosters_t. attendee_type_code)	'M' (Standing Member)	N/A	'M' (Standing Member)	'M' (Standing Member)
Attendee Role Code (meeting_rosters_t. attendee_role_code)	The following rules apply to all committee types except SEP committees. 1. If the member type code is chair (appointed, excluding ex officio appointed as Chair) or chair (not appointed, selected by committee vote) (cmte_members_t.member_type_code = '05' or '06') set the attendee role code to chair (meeting_rosters_t.attendee_role_code = '02'). 2. If the member type code is acting chair (cmte_members_t.member_type_code = '07') set the attendee role code to acting chair (meeting_rosters_t.attendee_role_code = '03'). 3. If the member type code is regular (cmte_members_t.member_type_code = '01') set the attendee role code to regular (meeting_rosters_t.attendee_role_code = '01'). 4. If the member type code is any of the ex officio's (cmte_members_t.member_type_code = '08', '09', '10') set the attendee role code to ex officio (meeting_rosters_t.attendee_role_code = '16').			

3.6.2.7 Committee Staff Search

If the user chooses to begin the selection of a federal staff from the Federal Staff Elements (Search/Query), the system performs the following activities:

1. Display the selected member's person information.
2. Clear and freeze the Member Elements.

Note: Appointment records are not created for committee staff, therefore, no default values are set for the fields in the cmte_members_t table.

Field	FACA Meetings, by Committee Type			Non-FACA Workgroups, any Committee Type
	IRG	SEP	NAC, PAC, BSC	
Appointment Type Code (cmte_members_t. appointment_type_code)	N/A	N/A	N/A	N/A
Member Type Code (cmte_members_t. appointment_type_code)	N/A	N/A	N/A	N/A
Attendee Type Code (meeting_rosters_t. attendee_type_code)	'S' (Committee Staff)	'S' (Committee Staff)	'S' (Committee Staff)	'S' (Committee Staff)
Attendee Role Code (meeting_rosters_t. attendee_role_code)	The following rules apply to all committee/meeting types. 1. If the federal staff type (See Data Validation for Federal Staff Types) is Scientific Review Administrator (cmte_fed_staff_types_t.fed_staff_type_code = 'S') set the attendee role to Scientific Review Administrator (meeting_rosters_t.attendee_role_code = '08'). 2. If the federal staff type (See Data Validation for Federal Staff Types) is Grants Technical Assistant (cmte_fed_staff_types_t.fed_staff_type_code = 'G') set the attendee role to Grants Technical Assistant (meeting_rosters_t.attendee_role_code = '10'). 3. If the federal staff type (See Data Validation for Federal Staff Types) is Executive Secretary (cmte_fed_staff_types_t.fed_staff_type_code = 'E') set the attendee role to Executive Secretary (meeting_rosters_t.attendee_role_code = '07'). 4. If the federal staff type (See Data Validation for Federal Staff Types) is Designated Federal Official (cmte_fed_staff_types_t.fed_staff_type_code = 'D') set the attendee role to Designated Federal Official (meeting_rosters_t.attendee_role_code = '09').			

3.6.2.8 Other Participant Search

If the user chooses to begin the creation of an other person for the meeting roster, the <<include>> Person Search will return a Person ID (persons_t.person_id). Once the person ID is known, the system performs the following activities:

1. Refresh Person Elements based on the selected Person ID (person_t.person_id).
2. Clear and freeze the Member Elements.
3. Set the attendee type code to other person (meeting_rosters_t.attendee_type_code = 'O'.

Note: A new appointment record is not created for other participants. Therefore, the defaults for the cmte_members_t table are not applicable.

Field	FACA Meetings, by Committee Type			Non-FACA Workgroups, any Committee Type
	IRG	**SEP**	**NAC, PAC, BSC**	
Appointment Type Code (cmte_members_t. appointment_type_code)	N/A	N/A	N/A	N/A
Member Type Code (cmte_members_t. appointment_type_code)	N/A	N/A	N/A	N/A
Attendee Type Code (meeting_rosters_t. attendee_type_code)	'O' Other	'O' Other	'O' Other	'O' Other
Attendee Role Code (meeting_rosters_t. attendee_role_code)	No default value	No default value	No default value	No default value

3.6.2.9 Mail Reviewer Search

If the user chooses to begin the creation of a Mail Reviewer for the meeting roster, the <<include>> Person Search will return a Person ID (persons_t.person_id). Once the person ID is known, the system performs the following activities:

1. Refresh Person Elements based on the selected Person ID (person_t.person_id).
2. Clear and freeze the Member Elements.
3. Set the attendee type code to other person (meeting_rosters_t.attendee_type_code = 'O'.

Note: A new appointment record is not created for a mail reviewer. Therefore, the defaults for the cmte_members_t table are not applicable.

Field	FACA Meetings, by Committee Type			Non-FACA Workgroups, any Committee Type
	IRG	**SEP**	**NAC, PAC, BSC**	
Appointment Type Code (cmte_members_t. appointment_type_code)	N/A	N/A	N/A	N/A
Member Type Code (cmte_members_t. appointment_type_code)	N/A	N/A	N/A	N/A
Attendee Type Code (meeting_rosters_t. attendee_type_code)	'O' Other	'O' Other	'O' Other	'O' Other
Attendee Role Code (meeting_rosters_t. attendee_role_code)	'19' (Mail Reviewer)	'19' (Mail Reviewer)	'19' (Mail Reviewer)	'19' (Mail Reviewer)

3.6.2.10 Attendee Types

The Attendee type code is set by the Person Select Option in Persons Elements as follows:

Attendee Type Code	Mechanism used to set attendee type code
'N' – Non-Standing Member	Other Member Option
'N' – Non-Standing Member	Previous Member Option
'M' – Standing Member	Standing Member Option
'C' – Federal Staff	Federal Staff Option
'O' – Other Public Person	Other Person Option
'X' – Non-Member	Profile Search for Non-FACA meetings

3.6.2.11 Previous Member Search

Search for previous members as follows:

1. If the Start Date is entered, find all records where the proposed start date (proposed_start_date) is greater than or equal to the Start Date. However, when displaying the Start Date, display the actual start date (actual_start_date) if not null and the proposed start date (proposed_start_date) otherwise.

2. If the End Date is entered, find all records where the proposed end date (proposed_end_date) is less than or equal to the End Date. However, when displaying the End Date, display the actual end date (actual_end_date) if not null and the proposed end date (proposed_end_date) otherwise.

3.6.2.12 Sorting the Data

A user can sort the data on the following columns: Name, Type, Role, Class, State, Institution, Title, Ros, Deg, Eth, Min, Fem, SSN or Coded Exp by clicking on the heading of that column.

3.6.2.13 Type Field

A user can click on the code in the attendee Type field to display a pop-up containing the description of this field, i.e., a user would see 'M' in the field and the pop-up would show 'Standing Member'.

3.6.2.14 Institution Field

A user can click on the data in the Institution field to display a pop-up containing the complete institution name. There is limited space on the form, so it will only show part of the name.

3.6.2.15 Date conflict warning message

Display a warning message if the actual start date overlaps with any existing meeting attendee or nomination records.

3.6.2.16 COI Tracking

The COI Tracking form should display all the active advisory committee members, regardless of whether they are actually attending the meeting. If a member is not attending, there should be space or a place to indicate that the member is not attending the meeting.

3.6.2.17 Checklist for finalizing a Roster

When the user selects 'Web roster' the system will perform an edit check to ensure the following information is present: a chair must be on the roster, gender and ethnicity data must be entered for all attendees, the title for each reviewer must be entered on the person role level record and the meeting must be announced in a federal register notice. If any items are missing, the user will be notified of which attendees are missing what pieces of information. User's will be able to proceed without correcting the data. The Grants Management business area has an edit checker feature.   That feature may be adopted.

3.6.2.18 Member's End Term

A member cannot be added to a roster if the end date of the meeting is after the actual end date of the member.

3.6.2.19 OK/Complete Box Not Checked E-Mail Alert

Send an e-mail alert to the SRA/GTA/CMO if the OK/Complete box is not checked within 4 weeks of the meeting date.

3.6.2.20 Current Committee Member Types

The following member types should be displayed on the Current Committee Member Types screen.

Code	Acronym	Description
01	REG	Regular (not Chair)
02	FLX	Flexible Member
05	CHR	Chair (appointed, excluding ex officio appointed as Chair)
06	CHR	Chair (not appointed, selected by committee vote)
08	EXO	Ex Officio
09	EXO	Ex Officio Designee
10	EXO	Ex Officio appointed as Chair
11	CHR	Chair, designated by Charter
14	APM	Assistant Professor Member

3.6.2.21 Deleting Voucher Records

If an attendee is deleted from a roster, the system must check the voucher record. A voucher record is created at the time the attendee record was created, so the system must check to see if any data has been entered on the voucher record. If no data has been entered, then the voucher record should be deleted with the meeting attendee record. If data has been entered, then the neither the meeting attendee record nor the voucher record can be deleted. Vouchers are stored in the meeting_expenses_t table. The foreign key is meeting_rosters_t.meeting_roster_id.

3.6.2.22 Change History Tracking

See Common Use Case Components, Other Requirements, Change History Tracking.

3.6.3 Sample Screens

3.6.3.1 Roster Maintenance

3.6.3.2 Attendee Data

3.6.3.3 Add Current Committee Members

3.6.3.4 Current Committee Members

3.6.3.5 Role Search (Previous Members)

3.6.3.6 COI Tracking Sample Screen