

Use Case Specification: Create New Trainee Appointment

Version 1.5

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	Version: 1.5
Use Case Create New Trainee Appointment	Date: 4/10/2003

Revision History

Date	Version	Description	Author
May 2, 2001	Early Draft	Draft Version	R. Reifsnider
May 17, 2001	Draft	Incorporates individual comments	R. Reifsnider
June 4, 2001	Draft	Incorporates comments from team review	R. Reifsnider
June 22, 2001	Draft	Incorporates references to Screen Specifications	R. Reifsnider
Jan 1, 2003	1.0	Added data elements, other mods	Steve Fitzgerald
March 14, 2003	1.2	Modified activity flow chart	Steve Fitzgerald
April 1, 2003	1.3	Enhanced textual flow definitions.	Steve Fitzgerald
April 7, 2003	1.4	Added select grant to flow, clarified what should be done if multiple profiles are found. Still need to change diagram to reflect new business flow.	Steve Fitzgerald
April 8, 2003	1.5	Incorporated several changes from requirements review, including removal of email being sent to QA upon finding duplicate profiles.	Steve Fitzgerald

	Version: 1.5
Use Case Create New Trainee Appointment	Date: 4/10/2003

Contents

1. Brief Description	3
2. Pre-Conditions	3
3. Flow of Events	3
3.1 Basic Flow	3
3.2 Alternative Flows	4
3.2.1 Invalid Form Entry	4
3.2.2 Invalid Request – Duplicate Trainee Appointment	4
4. Post-Conditions	7
5. Special Requirements	7
5.1 Data validation	7
5.2 Algorithms	7
5.3 Other Requirements	7

	Version: 1.5
Use Case Create New Trainee Appointment	Date: 4/10/2003

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1. Brief Description

This use case describes how an actor requests the creation of a new trainee appointment. Initially, NIH will have the opportunity to 'accept' or 'reject' the creation of a new Trainee Appointment via the TA module, and with version 2.1 of Xtrain, will be able to use Xtrain to do the same.

Note: NIH may chose to reject the Request to Create New Trainee of Appointment. In that case, the Trainee Appointment STATUS will be changed appropriately in IMPAC 2, which will notify the actor via e-mail.

2. Pre-Conditions

1. Actor has Commons Account
2. Grant has been awarded. (Grant exists for the purpose of Adding Trainees)

3. Flow of Events

3.1 Basic Flow

1. Login to Commons
2. Select the X-Train option
3. Select grant project <<include>> Use Case Select Project
4. Display Roster of Trainees <<include>> Use Case Display Roster of Trainees
5. Select the Request to Create a New Trainee Appointment option
 - a. Create new appointment
6. Select Grant <<include>> Select Grant Use Case (note this is not the same as Select Project). This allows the actor to pick a specific support year. Actor selects a specific support year.
7. The system displays the Request to Create a New Trainee Appointment form

Enter Form Data:

8. Complete the form. (The data to be entered in this form is shown in the Supplementary Specification and in Use Case Story Board).

	Version: 1.5
Use Case Create New Trainee Appointment	Date: 4/10/2003

9. Submit the form to the system.
10. The system validates the New Trainee Appointment data according to business rules documented in the supplementary specification.

Alternative Flow: Invalid Form Entry

11. The system verifies that the new trainee is not already appointed to the active grant for this project period. If the trainee is appointed to the active grant already, the total amount of support that the trainee receives cannot exceed 12 months. A trainee can not have more than one appointment during the same month/year.

~~The system should check to see if the trainee has ANY trainee appointments on any grants for the specified appointment period. If the system finds any appointments in the same appointment period for which the actor is attempting to create, then the system will display a warning to the actor indicating that the trainee is already assigned to a training grant for the specified period. This system check should occur at time in processing that minimizes the amount of time the actor has to wait for the system to do the check. It is recommended that this check be implemented when the submit button is hit to submit the appointment to NIH.~~

Alternative Flow: Invalid Request – Duplicate Trainee Appointment

12. <<Include>> Use Case Create the Trainee Appointment
13. The system modifies the Trainee Appointment STATUS to reflect the Request for Appointment
14. <<include>> Use Case Display Roster of Trainees
15. The system displays an indicator of success.

3.2 Alternative Flows

3.2.1 Invalid Form Entry

Data entered on the form is invalid. This is based on business rules specified in the supplementary specification.

1. The system redisplay the invalid entries clearly marked and with an explanation of the problem. The system allows the user to correct the invalid entries.
2. Continue with “Enter Form Data”

3.2.2 Invalid Request – Duplicate Trainee Appointment/Overlapping Appointment Attempting to Create a Duplicate Trainee Appointment

1. The system displays an error message indicating that the Trainee Appointment already exists on this grant, or has an overlapping appointment. This can be determined by searching for an existing

	Version: 1.5
Use Case Create New Trainee Appointment	Date: 4/10/2003

appointment record that has the same start and end dates as those entered, or if there are any existing appointments for the trainee that has any overlapping months. It is possible that a user can have multiple appointments in one year, as long as the appointments do not exceed 12 months. ~~A duplicate appointment is one in which there is already an appointment for the grant year that matches the month and year entered.~~

1. *Post Condition:* The Request to Create New Trainee Appointment process is unsuccessful.

	Version: 1.5
Use Case Create New Trainee Appointment	Date: 4/10/2003

4. Post-Conditions

1. A new Trainee Appointment request is submitted to NIH

5. Special Requirements

5.1 Data validation

See supplementary specification

5.2 Algorithms

When a new trainee is created, a check must be made to see if they already exist in the ERA database.

It is undesirable to have duplicate profiles in the ERA system. The algorithm should check for the presence of an existing profile by evaluating first name, last name, and SSN when determining if the trainee already has a profile in the ERA system. If the system finds **duplicate** profiles in the ERA database, the system should go ahead and create another profile, ~~and send an email to eRA data quality with the person_id's of the profiles~~. Data quality staff at NIH will then fix the profiles by combining the duplicates. NIH staff is best equipped to do this task, and should not be left up to the program director or delegate.

5.3 Other Requirements

None.