

## Questions that need to be answered

- how do we get list of residency programs? **ACGME website** (Lauren)
- what happens in LMS if user is no longer with residency program?
- what happens in LMS if user changes residency programs? (does old program keep their records)?
- Does CW API allow us to display catalog if user isn't logged in? (Brian)
- Can courses be hidden and manually assigned as needed so we don't have to create new roles like proctor, and committee member (vanessa)

## User Stories

### About OWLS Page

1. There will be an OWLS link on [SAGES.org](https://sages.org) under the Educational Content menu. Clicking the link will land the user on a page about OWLS.
  - a. The about OWLS page will include an explanation, a link to create an account and a link to login.
    - i. The register/create an account link will be used by non-members who don't have an existing account.
    - ii. Clicking the register/create an account link will bring the user to the Account registration page
    - iii. The login link will be used by members, and non-members who have an existing account
    - iv. Clicking the login link will direct non-logged in users to the login page, and logged in users to their OWLS dashboard.

### Program Pages

1. There will be an OWLS link on each Program's page. Clicking the link will direct non-logged in users to the About OWLS page, and logged in users to the course in the OWLS catalog.
  - a. *IT will attempt to pull catalog information for the course (pricing) onto this page as well. If possible, the catalog entry for the course will display regardless of the user being logged in. If this isn't possible, Program Managers will be responsible for updating the price, and description of their courses on SAGES.org.*

### Account Creation Form

1. Non-members, must create an account. The account creation form captures identifying information (user profile), includes a link to the 'Join SAGES' page, and an option to opt into the SAGES news letter.
2. User Profile Info (all required fields):
  - a. First Name, Last Name
  - b. Gender
  - c. Full Address
  - d. Phone
  - e. Email

- f. User Type (drop down list) see table below. If User type = Resident/Fellow display the below:
    - i. Institution
    - ii. Year of graduation
    - iii. Institution isn't listed (button that goes to New Institution Form)
3. Users will be automatically logged in and land on their SAGES profile page after they submit the form.
4. Staff must be able to update data for each new users profile.

#### **New Institution Form**

1. The New Institution form will let users tell the SAGES office that their Institution isn't on the Account Creation form.
2. The form will contain the following fields, and be sent to [testing@sages.org](mailto:testing@sages.org) on submit.
  - a. Name of institution
  - b. Contact at institution/residency program
  - c. Phone number for institution/Residency program
  - d. Email address for institution/residency program
  - e. Name of person submitting form if different from institution contact
  - f. email address for person submitting form if different from institution contact
3. SAGES staff will add the New Institution to the New Account form, and let the user know that they can create an account.

#### **Login Form/Authentication**

1. Members, and non-members with an account, will login to access OWLS. The login form captures the users email and password, and contains a link to reset the password.
2. Members will be prompted to confirm/provide their user profile information the first time they log in.
3. Every quarter, all users (member and non-member) will be prompted to confirm their user profile information.
4. Once logged in, users will see a link to SSO to OWLS on their SAGES profile page, and under the Membership menu
5. SAGES.org will authenticate both members and non-members into OWLS.

**OWLS User Roles/Membership Category Mapping**

- 1. User Roles in OWLS control pricing, and which courses appear under a users recommended course list. SAGES Membership categories will be mapped to a corresponding role, as will the User Types on the Create Account form.
- 2. Staff should be able to manually update/change the user type of all non-members, and add more than one type of user type to an account.

SAGES Membership CATEGORY	New Account User Type	OWLS Role
Active		SAGES Surgeon
Active/EAES		SAGES Surgeon
Allied Health		SAGES Allied Health
Assoc Active		SAGES Allied Health
Candidate		SAGES Trainee
Honorary		SAGES Surgeon
International 1		SAGES Surgeon
International 2		SAGES Surgeon
International 3		SAGES Surgeon
Medical Student		Med Student
Senior		SAGES Surgeon
Senior Journal		SAGES Surgeon
	Surgeon	Visiting Surgeon
	Resident/Fellow	Visiting Trainee
	Allied Health	Visting Allied Health
	Residency Coordinator	Institution Admin

**Updating User Roles**

- 1. Resident users should be updated to general surgeon user type once their expected year of graduation passes.
  - a. The SAGES membership database should be referenced for all users who are members. Member type= Candidate. User Role=SAGES Trainee
  - b. The database that stores the new account creation data should be referenced for all users who aren’t members. User Type= Resident/Fellow. OWLS User Role=Visiting Trainee

User Clicks Login on SAGES.org

