# Issues

|  |  |  |  |
| --- | --- | --- | --- |
| # | Description | Assigned To | Status |
| *1* | Originally use case allowed a role to be entered, then it could be associated with one or more facility locations, or the user could selected the “all facility locations” option. This approach was scrapped because each role must have its own role start date and role end date. |  | Closed |
| *2* | The use case allows an owner/authorized person role to be associated with any facility location, including closed and inactive. This can be adjusted in the future if necessary. Similarly, if a facility location closes, could add logic to require associated roles to be ended. |  | Closed |
| *3* | If a facility location has waivered service that requires training and those that do not require training, the assumption is that the ME supervises those that require training. |  | Closed |

# Description

This use case describes managing the roles of an owner/authorized person.

Note:

# Primary actor(s)

1. User

# Main flow: Add owner/authorized person role

## Precondition(s)

1. User is operating on an owner/authorized person

## Steps

1. User invokes option to manage the roles of an owner/authorized person (also referred to as the owner/authorized person roles)
2. System displays a list of previously entered roles for the owner/authorized person
3. User invokes option to add a role to the owner/authorized person
4. System displays a list of role names based upon the role type of the owner/authorized person and whether or not the provider profile has a PCA service – see Ownership Table.xls
5. User selects a role name
6. If the selected role name is “Owner”, user selects an ownership/managing control type – see Ownership Table.xls
7. User enters the role start date (see Ownership table for specific label based upon the role)
8. If applicable, user selects a facility location from a list of all facility locations of this provider profile – see Ownership Table.xls for role names where the g/f indicator is “f”
9. If the role name is “Managing Employee” and the facility location has one or more PCA service and one or more non-PCA service(s), user must specify if the person supervises PCA personnel
10. If the role name is “Managing Employee” and the facility location has one or more training required waivered services and and one or more healthcare services, use must specify if the person supervises waivered service personnel
11. User enters additional information based upon the selected role– see Ownership Table.xls
    1. Specify other, subcontractor name, percent ownership, qualified professional type, mental health professional type, license number
12. System performs the following:
    1. Clears additional information no longer required when role is changed, see use case rule 175
    2. Validates required fields are present, see Ownership Table.xls
    3. Validates field formats and other misc. logic, see use case rules 83, 91, 168, 178, 206, 179
    4. Validates role is not a duplicate, see use case rule 94, 169
    5. Validates % ownership does not exceed 100% - see use case rules 194, 195, 196
13. Steps 2 – 12 are repeated for each role of the owner/authorized person
14. User indicates they are finished entering roles for the owner/authorized person
15. System verifies that the owner/authorized person has at least one role
16. Use case ends

Flow notes:

* UC009 facility locations contains logic related to deleting roles that reference a facility location that is deleted
* UC017 organization services contains logic related to when a service is deleted
  + If the deleted service is the last PCA service which leaves only non-PCA services, then:
    - PCA related roles are deleted (Qualified Professional and PCA Biller)
    - the supervise PCA personnel answer is cleared because the answer is inferred to be “No”
  + If the deleted service is the last non-PCA service which leaving only PCA services, then the supervise PCA personnel answer is cleared because the answer is inferred to be “Yes”
  + If the deleted service is the last training required waivered service which leaves only services that do not require waivered services training, then the supervises waivered service personnel answer is cleared because the answer is inferred to be “No”
  + If the deleted service is the last healthcare service which leaving one or more training required waivered service (it may or may not leave training exempt waivered services), then the supervise waivered service personnel answer is cleared because the answer is inferred to be “Yes”
* UC009 and UC017 also contain addition logic that if owner/authorized person has no roles after the delete, that the owner/authorized person is also deleted using the delete flow in UC031

## Alternate flow: Update owner/authorized person role not "in MMIS"

This flow begins after step 2 of the main flow.

1. User selects an owner/authorized person role that is not in MMIS and invokes update option
2. Continue with step 6 of the main flow

Note: When the owner/authorized person role is not in MMIS, then role name is the only field that is not editable.

## Alternate flow: Update owner/authorized person role partially "in MMIS"

This flow begins after step 2 of the main flow.

1. User invokes update option on an owner/authorized person role where the role is in MMIS
2. If the supervises PCA personnel is blank, “No”, or the supervise PCA personnel is answered “Yes” but the yes answer is not yet in MMIS, then the user can update the answer
3. If the supervises waivered services personnel is blank, “No”, or the supervise waivered services personnel is answered “Yes” but the yes answer is not yet in MMIS, then the user can update the answer
4. Continue with step 11 of the main flow

Notes:

* When the owner/authorized person role is in MMIS, then the role name, ownership type, role start date, and facility location are not editable.
* This flow allows the answer of the supervise personnel question to be changed from “No” to “Yes” for roles that are in MMIS.
  + The benefit of this is that if a ME was not supervising services, then begins supervising services, the old role does not need to be ended a new role started
  + The downside of this is that it will appear as if the ME was supervising services the entire time they were performing the ME role

## Alternate flow: Update owner/authorized person role completely "in MMIS"

This flow begins after step 2 of the main flow.

1. User invokes update option on an owner/authorized person role where the role is in MMIS
2. If supervise PCA personnel is answered “Yes” and the yes answer is in MMIS, then the user cannot change the answer
3. If supervise waivered services personnel is answered “Yes” and the yes answer is in MMIS, then the user cannot change the answer
4. Continue with step 11 of the main flow

## Exception flow: Cannot update owner/authorized person role that is ended

When the role of an owner/authorized person has a role end date, the role cannot be updated.

Flow note:

* If the role is ended the information is available via UC111 provider profile report.
* It is important that rules 178 and 206 does not enforce the supervise personnel questions are answered for ended roles. Must avoid scenario where rules say “Must answer supervise personnel question” but the system does not allow the user to edit the record because it has a role end date.

## Alternate flow: End owner/authorized person role “in MMIS”

This flow begins after step 2 of the main flow.

1. User selects an owner/authorized person role that is in MMIS and not ended and invokes end option
2. User enters role end date
3. Continue with step 11 of the main flow

## Alternate flow: Reinstate owner/authorized person role

This flow begins after step 2 of the main flow.

1. User selects an owner/authorized person role that is ended and invokes option to reinstate
2. System informs user not to reinstate role if there was a break in the performance of the role
3. User chooses to continue
4. System removes the role end date
5. Continue with step 11 of the main flow (rules must verify reinstate does not create a duplicate)

## Alternate flow: Delete owner/authorized person role not "in MMIS"

This flow begins after step 2 of the main flow.

1. User selects a role that is not in MMIS and invokes delete option
2. System displays a warning message
3. User chooses to continue
4. System performs the following:
   1. Deletes the role
   2. Clears owner/authorized person additional information that is no longer required due to not having necessary role
5. Continue with step 12 of the main flow

## Exception flow: Delet0e owner/authorized person role “in MMIS”

When the role of an owner/authorized person is in MMIS, then the owner/authorized person cannot be deleted.

# Change control

| Version | Date Revised | Revised By | Revisions |
| --- | --- | --- | --- |
| 1 |  | David Marsh | Initial draft |

# Supervise question decision table

|  |  |  |  |
| --- | --- | --- | --- |
| **Have PCA service(s)** | **Have non-PCA service** | **Display supervise PCA question** | **Answer** |
| N | N | N/A - invalid | N/A - invalid |
| Y | N | No | Infer Yes |
| N | Y | No | Infer No |
| Y | Y | Yes | User pick |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Have training required waivered service** | **Have non-training required waivered service** | **Have healthcare service** | **Display supervise waivered services question** | **Answer** |
| N | N | N | N/A - invalid | N/A - invalid |
| Y | N | N | No | Infer Yes |
| Y | Y | N | No | Infer Yes |
| N | Y | N | No | Infer No |
| N | Y | Y | No | Infer No |
| N | N | Y | No | Infer No |
| Y | N | Y | Yes | User pick |
| Y | Y | Y | Yes | User pick |