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| ***MEETING MINUTES*** |  |

**SCRIBE:** Gaby Tulchinskaya

**PROJECT:** GreenSheets Re-Design

**MEETING NAME:** GreenSheets Re-Design

**ATTENDEES:** OGA:Crystal Wolfrey, Eugenia Chester, Stacey Kocher, Sean Hine

CBIIT: Nelya Gunina, Jennifer Kwok, Yakov Polonsky, Gaby Tulchinskaya, Subashini Varadarajan.

**MEETING DATE/LOCATION:** 05/31/2017; 9609 Medical Center Dr., Meeting Room # 6E032/034

**Purpose of the meeting is to discuss:**

* Mockups for Draft (Test) area in Greensheets
* Proposed changes for expanding all questions
* Mockups for Program staff
* Discussion of icons
* Discussion of Diversity PD role

**Discussion and decisions**:

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| Topic | Decisions |
| Ruses for questions with sub-question(s) | **Should be implemented in DRAFT area and outside of DRAFT area**   * ‘Preview All Sub Questions’/’Exit Preview’ buttons and functionality are not needed * Visual indicator is needed if a parent question has sub-question(s), regardless of:   + question options (e.g. if parent question has option answers Yes/No and sub-question do NOT exist for ‘Yes’ answer, but exist for ‘No’ answer, parent question should have this indicator’)   + if question is answered or not (e.g. if user selected ‘Yes’ answer option, which does NOT have sub-questions, but ‘No’ answer option has sub-questions, indicator should stay) * Ability to expand every individual question to view sub-question(s) is needed. * If top level question is NOT answered, sub-questions should be displayed in read-only mode. * If top level question IS answered, only sub-questions related to a provided answer should be displayed. * The system should NOT provide ability to collapse answered questions. |
| DRAFT area – “Review & Test Draft **Module** screen” | * Every time when user clicked “Send Email to Testers” button, the system should wipe up all the names in “Test Completed By:” column * OGA will provide a boiler plate for the email text that should be generated when user clicked “Send Email to Testers” button. See action item #2 |
| DRAFT area – “Review & Test Greensheet” screen | * ‘Print’ button is not needed * Change the tool tip text:   + From “Comments for Review Mode are Disabled” to “Comments for Test Mode are Disabled” - when a mouse hovers over “View All Comments” button and/or ‘comments’ icon   + From “Add Attachments is Disabled in Review Mode” to “Add Attachments is Disabled in Test Mode” - when a mouse hovers over ‘attachment’ icon |
| Greensheet outside of DRAFT area | * Reset Greensheet functionality – When user clicks OK on the warning pop up, the system should save all the changes; user should not be forced to click Save button |
| Search criteria on PROGRAM screen | * The line with grant number and FY should become a 2nd line in the search portion of the screen, Move the line with portfolio to the top * Example for grant number should be displayed in the corresponding boxes, similar to other fields * If user is search by Serial # only, FY should be defaulted to blank, allowing to search for the whole project tree |
| Hit List (search results) portion of PROGRAM screen | * Rename the column “# Days in GPMATS” to “# of Days with OGA” * Tool tip for a thumb up icon should be “GS can be Submitted”. (Note: OGA can re-evaluate this text after UAT) |
| All other mockups features, not mentioned above | Approved |
| Roles | * Change of Program Analyst to Program Staff has been approved * Within PD Assignment module, diversity supplements grants can be assigned to CRCHD PD with appropriate Cancer Activity. Such PD will be able to process greensheets for a diversity supplement grant as part of their portfolio. CBIIT posed a question if Diversity Supplement PD role can be eliminated. OGA will discuss this issue and get back to CBIIT. |

**Next steps:**

* After CBIIT will make changes to mockups, described above, additional meeting is needed for the final approval of the mockups
* Discussion and final decision for Diversity Supplement PD role is needed

**Action items**:

| Item | Action | Related to | Status | Responsible party |
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|  | Resolve Diversity Supplement PD role | Within PD Assignment module, diversity supplements grants can be assigned to CRCHD PD with appropriate Cancer Activity. Such PD will be able to process greensheets for a diversity supplement grant as part of their portfolio. CBIIT posed a question if Diversity Supplement PD role can be eliminated. OGA will discuss this issue and get back to CBIIT | Open | OGA |
|  | Provide a boilerplate to the email in draft area | Sample was:  **TO:**  **FROM:** ???  **SUBJECT:** Request to test the new greensheet form(s)  **BODY:** Please click:  To test <New form name 1> - (form type) for <list of type/mech combinations>  To test <New form name M> - (form type) for <list of type/mech combinations>  And provide a feedback in a separate email to <insert email> | Open | OGA |