

Party_Organization TreeView and Demographics

I. Organization Tree View

default - Windows Internet Explorer provided by DHSS/ITSD

http://devoapp/webmohsis/default.aspx?tc=Organization

State of Missouri
DEPARTMENT OF HEALTH AND SENIOR SERVICES
Username: swadm04 Sign Out
Agency: DOH-CENTRAL OFFICE

Home Person **Organization**

Search [Instructions](#)

ATTA BOY HOSPITAL

- Locators
- Contacts
- Notes
- Provider Roles (3)

[Refresh Tree](#)

*** Denotes required field.**

Demographics for ATTA BOY HOSPITAL (Party ID = 5688998)

Organization Type: HOSPITAL

Name: * Name Type: *

Begin Date: * (mmddyyyy) End Date: (mmddyyyy)

[Add to List](#) [Clear](#)

	Name Type	Name	Begin Date	End Date
Edit	PRIMARY	ATTA BOY HOSPITAL		
1				

Local intranet 100%

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II. Screen prototype: Organization Demographics Initial Load

The screenshot shows a web browser window with the following elements:

- Browser:** Windows Internet Explorer provided by DHSS/ITSD. Address bar: `http://devoapp/webmohsis/default.aspx?tc=Organization`. Search bar: Live Search.
- Page Header:** State of Missouri, DEPARTMENT OF HEALTH AND SENIOR SERVICES. Username: swadm04. Agency: DOH-CENTRAL OFFICE.
- Navigation:** Home, Person, Organization (selected). Search, Instructions.
- Left Panel (TreeView):**
 - ATTA BOY HOSPITAL
 - Locators
 - Contacts
 - Notes
 - Provider Roles (3)
 - Refresh Tree
- Main Content Area:**
 - Message: * Denotes required field.
 - Section: Demographics for ATTA BOY HOSPITAL (Party ID = 5688998)
 - Organization Type: HOSPITAL
 - Button: ADD NAME
 - Table:

	Name Type	Name	Begin Date	End Date
Edit	PRIMARY	ATTA BOY HOSPITAL		
1				

Organization.aspx?pid=5688998&partytype=ORGANIZATION&ACTION=VIEW

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III. Screen prototype: Organization Demographics Add Name

State of Missouri
DEPARTMENT OF HEALTH AND SENIOR SERVICES
Username: swadm04
Agency: DOH-CENTRAL OFFICE

Home Person **Organization**

Search [Instructions](#)

* Denotes required field.

Demographics for ATTA BOY HOSPITAL (Party ID = 5688998)

Organization Type: HOSPITAL

	Name Type	Name	Begin Date	End Date
Edit	PRIMARY	ATTA BOY HOSPITAL		
1				

Organization.aspx?pid=5688998&partytype=ORGANIZATION&ACTION=VIEW

Notes, Locators (Addresses, Telephone, Email), Contacts and Provider Roles are the same as the PERSON screens.

Display on Grids

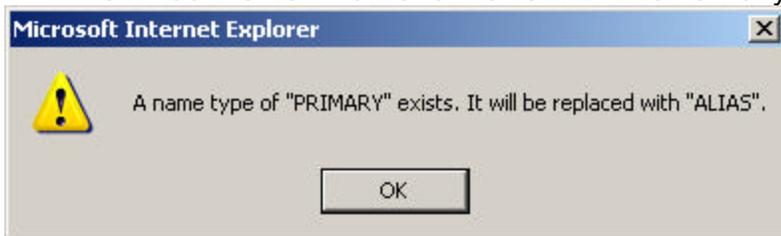
- a. **Before Save** of Record – Display
 - i. Remove/Delete

IV. Validate the following:

- a. The page displays as per web standards
- b. Drop down lists are loaded correctly:
 - **Name Type** (SURVWEB_LOOKUP_NAME table – LIST_NAME: PARTY NAME TYPE)
- c. Sort list as follows:
 - o **Names** sort by Name Type with Primary always first and then by Organization Name.

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- d. Text Boxes – (ORGANIZATION NAME)
- All text boxes transform text to uppercase on entry
 - Trim all spaces from the beginning and end of textbox text before checking it for errors and before storing it in the database
- e. When the user scrolls, save the position. When the screen reloads, use the latest scroll position to redisplay the screen in the same position as it was before the reload.
- f. Date Fields: (BEGIN_DATE, END_DATE)
- Display should include label, entry field, calendar icon, and format
[Label: (mmddyyyy)]
 - The calendar controls works correctly.
 - Display “Invalid Date“ to the right of the Date field that is not a valid date (i.e. does not have a valid month day year combination) as soon as the user leaves the field. Earliest valid date is 01011800.
 - Date fields - listed above – 8 (must have day in this date so it must be exactly 8 digits)
 - When click the calendar icon and select a date, keep the cursor on the date field so the user can tab to the next field.
 - Only allow entry of numbers (no characters)
- g. No more than the maximum number of characters can be entered into the following fields:
- Organization Name - 64 characters
- h. The following error messages display in the order of the fields on the screen if applicable when the user clicks [Add to List](#) or the **Save** button:
- Organization Name is required
 - Name Type is required
 - Begin Date must be prior to End Date
 - Begin Date cannot be future date
 - End Date cannot be future date
 - Organization Name must be alphanumeric, punctuation cannot be entered
- i. If a primary name exists and the user adds another name with PRIMARY name type, display the message “A name type of PRIMARY exists. It will be replaced with ALIAS” with OK button.
- After clicking ok, set the name type for the previous primary name to ALIAS and
 - Add the new name to the list with the name type of PRIMARY.



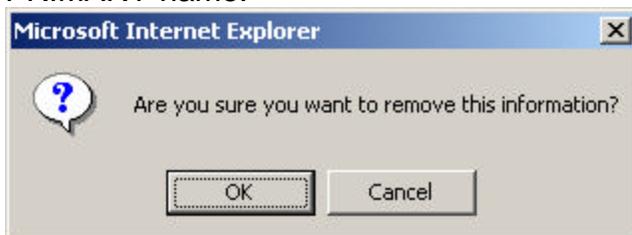
I. Buttons & Links

- b. Error Messages - Validation to display messages to the user will not be performed on [Clear](#), [Cancel](#) or on **Cancel**
- c. Waiting - When click a link that will bring up another page, display a popup with the pyramid image and a message such as of "Working, please wait..." as per standards.
- d. When click the **Save** button, check to see if anything has been entered but not added to a list. If so, then display “Information has been entered to add to a list, click Add to List or Clear

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the information” in that section(s) and do not save. If not and it passes all edits, then save to the database.

- e. When click **Cancel** button, change to View mode so that the user cannot make changes.
- f. When click a [Clear](#) link, 1) clear out the entry fields in that section and 2) clear out error messages in that section.
- g. When click an [Add to List](#) link, validate the entry fields in that section and their combinations.
 - i. If passes validation,
 1. Add those items to the grid in a new row that has a [Remove](#) link sorted the same as prior to clicking the link and
 2. Clear out the entry fields in that section and
 3. Clear out error messages in that section.
 - ii. If fails validation, display the error messages above the entry fields in that section.
- h. When click an [Edit](#) link to edit a record
 - i. Clear out error messages in that section
 - ii. Display the information for that row in the entry fields
 - iii. Hide its Add to List and Clear links
 - iv. Show its Replace and Cancel link instead in the row
 - v. Hide the Edit and Remove links in that row
- i. When click [Replace](#) link to replace a record, do the same as when click [Add to List](#) link, but if it passes validation then show its [Add to List](#) and [Clear](#) links and hide its [Replace](#) link.
- j. When click [Cancel](#) link to cancel edit of a record, do the same as when click the [Clear](#) link. Then show its [Add to List](#) and [Clear](#) links and hide its [Replace](#) link.
- k. When click a [Remove](#) link, display the following popup. [Remove](#) is NOT available for PRIMARY name.

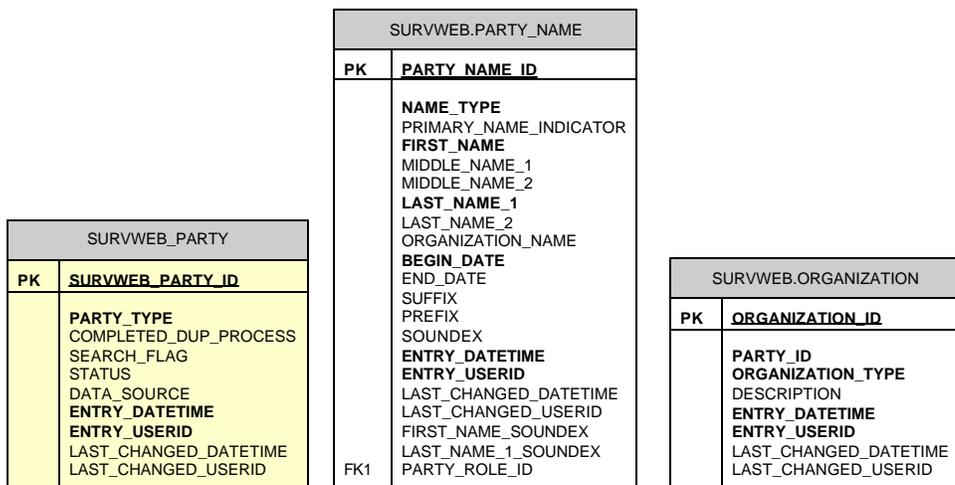


- i. If click, OK,
 1. Remove the row from the grid display and if it was the only row, display “No items” as displayed in the screen shot above and
 2. Clear out the entry fields in that section and
 3. Clear out error messages in that section.
- ii. If click Cancel, then do not remove the row from the grid display and do not clear any entry fields or error messages.
- l. Sorting - When click a column header in a grid, check to see if the sort is currently on that column. If so, sort the list on that column ascending or descending (opposite of what it currently is). If not, sort the list on that column ascending. Dates sort include the month, day and year.
- m. Tab Order - The tab order should default as top to bottom left to right unless otherwise stated.

II. Database routines – Screen Information

- a. Retrieval of the user’s security to display the Update button appropriately
- b. Information will be stored in tables as shown below:

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SURVWEB_PARTY

Field on Screen	Field in Database	Database column
NA	SURVWEB_PARTY_ID	Generate a SURVWEB_PARTY_ID
NA	PARTY_TYPE	Set PARTY_TYPE = PERSON or ORGANIZATION
NA	COMPLETED_DUP_PROCESS	Set COMPLETED_DUP_PROCESS to 'N'
NA	SEARCH_FLAG	SEARCH_FLAG – default to NULL
NA	STATUS	Set STATUS = ACTIVE
NA	DATA_SOURCE	Set DATA_SOURCE to NULL (if new to survweb or MOHSAIC if coming over from MOHSAIC)
NA	ENTRY_DATETIME	Set ENTRY_DATETIME = SYSDATE
NA	ENTRY_USERID	Set ENTRY_USERID = userid
NA	LAST_CHANGED_DATETIME	NULL
NA	LAST_CHANGED_USERID	NULL

SURVWEB_PARTY_NAME

Field on Screen	Field in Database	Database column
NA	SURVWEB_PARTY_NAME_ID	Generate a SURVWEB_PARTY_NAME_ID
NA	SURVWEB_PARTY_ID	Set SURVWEB_PARTY_ID to SURVWEB_PARTY_ID
NA	PARTY_TYPE	Set PARTY_TYPE to

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		PARTY_TYPE
Name type	NAME_TYPE	Set NAME_TYPE to NAME_TYPE
Begin Date	BEGIN_DATE	Set BEGIN_DATE to BEGIN_DATE
End Date	END_DATE	Set END_DATE to END_DATE
Prefix	NAME_PREFIX	Set NAME_PREFIX to NAME_PREFIX
First Name	FIRST_NAME	Set FIRST_NAME to FIRST_NAME
First Middle Name	MIDDLE_NAME1	Set MIDDLE_NAME1 to MIDDLE_NAME1
Second Middle Name	MIDDLE_NAME2	Set MIDDLE_NAME2 to MIDDLE_NAME2
First Last Name	LAST_NAME1	Set LAST_NAME1 to LAST_NAME1
Second Last Name	LAST_NAME2	Set LAST_NAME2 to LAST_NAME2
Suffix	NAME_SUFFIX	Set NAME_SUFFIX to NAME_SUFFIX
Organization Name	ORGANIZATION_NAME	Set ORGANIZATION_NAME to ORGANIZATION_NAME
NA	ENTRY_DATETIME	Set ENTRY_DATETIME = SYSDATE
NA	ENTRY_USERID	Set ENTRY_USERID = userid
NA	LAST_CHANGED_DATETIME	NULL
NA	LAST_CHANGED_USERID	NULL

SURVWEB_PARTY_ORGANIZATION

Field on Screen	Field in Database	Database column
NA	SURVWEB_PARTY_ORGANIZATION_ID	Generate a SURVWEB_PARTY_ORGANIZATION_ID
NA	SURVWEB_PARTY_ID	Set SURVWEB_PARTY_ID to SURVWEB_PARTY_ID
Last Name	LA	Set ORGANIZATION_TYPE to ORGANIZATION_TYPE
Description	DESCRIPTION	Set DESCRIPTION to DESCRIPTION
NA	ENTRY_DATETIME	Set ENTRY_DATETIME = SYSDATE
NA	ENTRY_USERID	Set ENTRY_USERID = userid
NA	LAST_CHANGED_DATETIME	NULL
NA	LAST_CHANGED_USERID	NULL