# Personal Management:

* Personnel List 🡪 Add Employee, Enter First Name/Last Name and Date of Birth.
* The GBG portal which we are working is for all the department belongs to the laboratory workflow, to manages their employee personal information and laboratory details and to maintain the document for the lab. This portal should help them during CAP /NY inspection
* Below mention are the possible lists of the laboratory departments in the GBG, except # 8 to 10.

1. Quality Control
2. Clinical Lab
3. Administration
4. Research & Development
5. Institute for Bio Research
6. Humigen
7. AME
8. Information Technology
9. Billing.
10. Finance and Accounting.

* Below mention are the possible list of Job titles in the Laboratory

1. Quality Control Technician
2. Quality Control Assistant Manager
3. Specimen Resolution Assistant
4. Lab Accessioner
5. TCA Coordinator
6. Histotechnician
7. Lab Technician
8. Cytotechnologist
9. Pathology slide Processor
10. Robotic Service Technician
11. 3rd shift coordinator

* For all the employees, who have the position in the laboratory, should have the credentials attached when their position is started. Below are the credentials required for all the NJ and NY Position.
  + Diploma
  + Transcript
  + ASCP Board of Certification
  + NY State Cytotechnologist Registration
  + NY State Certificate of Qualification
  + The American Board of Pathology Certification
  + NJ Bio analytical Lab Director License
  + State Medical License
* Based on the position level, some of the document is mandatory (Refer Excel). We should trigger an email to the admin mail group, if we miss the mandatory document after the one week of start date of the position.

One email trigger with the list of employee missing the Credentials. Ex:

|  |  |  |
| --- | --- | --- |
| Name of the Employee | Job Position | Missing document |
| Mark | Director | NY State Certificate of Qualification |
| Transcript |
| Vladimir | Director | The American Board of Pathology Certification |
| Diploma |

QA NOTE: There are some document is not applicable based on the degree. Create one employee with MD degree for that position and another employee with PhD position on the same degree to see how the validation works

* If the Excel says NA , that means that is not mandatory to trigger admin attention. But if the employee has it and they wish to upload , we are not stopping them.
* If the employee is Director for both NJ and NY State, make sure all the credentials are uploaded for the employee.
* Below mention are the possible list of positions in the Laboratory, This defers from NJ and NY directory. Same Employee can have multiple positions and multiple state titles also.



* Employee with multiple department is very rare, but with multiple title is possible with few , and multiple position in the lab is very common.
* For Laboratory competency assessments , we need 3 document
  + Initial Lab Competency 🡪 3 months from the position start Date.
  + Advanced Lab Competency 🡪 6 months from the initial Lab Competency
  + Annual Lab competency 🡪 1 year from the Advanced Lab Competency

Ex: Employee start date of the position is 2/10/2020 , ILC is due on 5/10/2020. Email should trigger to the admin following Monday , i.e 5/11/2020.

ALC is due from 6 months of 5/11/2020 that will be 11/11/2020, so email will be following Monday.

* For Training, below documents are required.
  + Initial Safety 🡪 3 months from the position start Date.
  + Annual Safety 🡪1 year from the Initial safety
  + Training Logs 🡪 Will confirm
  + HIPAA 🡪 Every year
  + Thin Prep Pap Morphology Certificate 🡪One time
* For Technician Continuing Education Test, Every month they provide lab employee some presentation and followed by quiz. Each month they pick different topics and have tests.

In this Tab, we can have validation by end of the month for that month document upload.

# Approval Process:

* Some document requires Manager Approval; approval can be of max 5 people. We can have a flag for manager approval in DB for the entire document, and we can add their email id as well.
* Whenever employee add the documents which require manager’s approval, we will notify the managers. We can set this email every Monday.
  + Subject : Approval Required for the week of MM-DD-YYYY
  + Below Employee uploaded the documents for approval

|  |  |  |
| --- | --- | --- |
| Name of the employee | Name of the document | Type |
| Employee 01 | Diploma.PDF | Credentials |
| Employee 02 | Transcript.PDF | Certification |

Until all the people approved the document, we will have email trigger.

EX: Bhavya is the employee and uploading the document, that requires mark and Vladimir approval. On Monday email will trigger to Mark and Vladimir for their approval.

Mark approved the document, but it is pending from Vladimir. Then next week re-send a notification to Vladimir only and in Vladimir dashboard too.

# GBG Dashboard

* Manager can login to the GBG Doc, in Dashboard
* Create “ Pending Approval” Section
  + We can show the list of employee uploaded the document for approval

|  |  |  |  |
| --- | --- | --- | --- |
| Name of the employee | Name of the document | Type | Action |
| Employee 01 | Diploma.PDF | Credentials | View / Approve/Forward |
| Employee 02 | Transcript.PDF | Certification | View / Approve/Forward |

View Link 🡪 they can open the document uploaded

Forward 🡪 They can forward the document to other user (who is the active user in the GBG Portal), and add comments in the body of the page and send

Approve 🡪 would ask for the electronic Signature and date pick er. User should be able to pick the previous date too

* “ Documents Due “ Section
  + We can show the list of employee missing documents

|  |  |  |  |
| --- | --- | --- | --- |
| Name of the employee | Missing document | Type | Action |
| Employee 01 | Diploma.PDF | Credentials | View/Forward |
| Employee 02 | Transcript.PDF | Certification | View/ Forward |

View Link 🡪 will re-direct to the employee

Forward 🡪 They can forward to the employee , asking for the documents.

In both the section, if the employee is not attended for more than 30 days, will change the row color