[Provider Certifications BR]

Clockify Project/Task:	Custom eLG Software Development
Requester:	████████████████ r)
Priority:	
Related Features:	
Expected Client Delivery/Project Hours Allocated:	
Additional References:	N/A
Business Analyst:	SG

Contents

Change Log

#	Date	REF #	Previous	New	RQ/C	Writers	Solutions	UI/UX	CTO
	MM.DD.YYYY		INITIAL INTERNAL SIGN-OFF						
					RQ/C	Writers	Solutions	UI/UX	CTO
					RQ/C	Writers	Solutions	UI/UX	CTO
					RQ/C	Writers	Solutions	UI/UX	CTO

General Information/Overview

Summary	TheProviderCertificationsManagement feature allows admins to upload, track, and manage certifications for providers via the Files section in the Provider record. Admins can assign metadata (e.g., certification type, issue date, expiration date), track compliance, and set reminders for certification renewals.
Problem	Admins need an efficient way to manage and track provider certifications to ensure compliance. Without a centralized location for storing and monitoring certification statuses, keeping track of expiring certifications becomes difficult.
Goal	Provide an interface for admins to upload and manage provider certifications, assign metadata (tags), and track expiration dates. The system should also send automatic reminders for expiring certifications to ensure providers remain compliant.
Scope	• Upload certification documents to the Files section under Provider Profile. • Tag certifications with relevant metadata (certification type, issue date, expiration date). • Set notifications for certification expirations. • Ensure providers can view, but not edit, their certifications.
Risks	N/A
Key Terms/Definitions	**Certification**: A document verifying that a provider has completed certain training or qualifications.
Policies/Rules/Flags	• Only admins can upload, tag, or delete certification documents. • Providers can view certifications but cannot edit or delete them. • Notifications for certification expiration must be triggered 30 days before expiration.
Feature Flow	• Admin logs into the system. • Admin navigates to the "Provider Record" and selects the "Files" section. • Admin uploads certification documents. • Admin assigns metadata (certification type, issue date, expiration date). • System tracks certifications and sends notifications 30 days before expiration.

Business Requirements

Location (s): Provider Record > Documentation > Files
Assumption/Precondition: Admin must have the appropriate permissions and be logged into the system.

BR 1: Provider Certifications Management

UC 1: Admin Uploads Certification Documents

US 1: As an admin, I want to upload certification documents to the provider record so that the certifications are stored in a centralized location for compliance.

- Admin logs into the system.

- Admin navigates to the Provider record and selects the "Files" section.

- Admin clicks the "Upload" button and selects a certification document (PDF, DOC, JPG).

- Admin assigns metadata to the certification (certification type, issue date, expiration date).
  The certification is stored under the "Certifications" folder within the Files section.

UC 2: Admin Tags and Tracks Certifications

US 2: As an admin, I want to tag and track certifications with metadata (e.g., issue dates, expiration dates) so that I can manage compliance and set notifications.

- Admin can tag the certification with relevant metadata:

    o   Certification type (CPR, first aid, etc.).

    o   Issue date.

    o   Expiration date.

- Admin filters certifications using tags like "Expiring Soon" to track upcoming renewals.

- Admin can view a dashboard of expiring certifications.

- Notifications are set to alert admins and providers 30 days before the expiration date.

UC 3: Provider Views Certifications

US 3: As a provider, I want   to view my certifications in the
Files section so I can ensure my documents are up to date and accessible.

- Provider logs into the system and navigates to their profile.

- Provider selects the "Files" section and views the certifications under the "Certifications" folder.

- Provider cannot edit or delete certifications.

- Certifications are displayed with their tags (e.g., "Certification Completed").

UC 4: Admin Sets Notifications for Certification Expiration

US 4: As an admin, I want to set notifications for certification expiration dates so that I can alert providers about necessary renewals.

- Admin sets up notifications for certification expiration dates.

- Admin configures notification rules (e.g., 30 days before expiration).

- Notifications are automatically sent to providers and admins.

- Notifications include links to the certification document and next steps for renewal.