**175455: Interim VEFT Regression Test**



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State: Draft

Originator: Gibbons, Joel D. (Booz Allen Hamilton) Owner: Type: Manual

Test Data: Unassigned

Description: Interim VEFT Regression Test - complete procedure is under construction and will take the form of a suite

**Summary**

**Categories**

Function: Unassigned

Test Phase: Integration Test

**Formal Review**

General Comments

**Manual Steps**

**Step 1**

**Execution Step**

Description\*

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| **PA** | Pre-requisites | If you are changing environments, clear cache and delete temporary internet files.  Emails are set to route to the tester(s). |
| **PA** | Log In:  Splash Screen | Double-click the USD icon on your desktop or task bar.  Verify the Unified Service Desk splashscreen pops up.  Quickly click the Change Credentials link in the bottom/right of the splash screen.  Verify the USD Login modal builds. Enter the following:  Deployment Type: On- premises |

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|  |  | Server URL for INT/ QA access (use **URL**for the Training environment)  Authentication Source: Active Directory  User Name: DNS  Password: (as disseminated)  Domain: leave blank  Click the checkbox to Display list of available organizations  Click the Login button.  Verify the USD Organizations modal builds. |
| **PA** | Log In:  Select Environment, Session Login | Select the intended environment and click the Login button. Verify the USD Splashcreen re-displays.  After less than a minute, verify the splash screen disappears and the USD GUI builds.  You may have to click it in your task bar to bring it to the top.  Click the maximize icon at the top right.  Verify the following banner tools display: PATIENT SEARCH, ANONYMOUS ROC, DASHBOARDS |

**Step 2**

**Execution Step**

Description\*

Click on the DASHBOARDS

tool in the banner.

Verify a DASHBOARD session starts, and that you are prompted for your user id and password.

After entering, verify the dashboard populates with four containers (scroll to the right).

Expected Results

Per "verify" statements in the procedure. Comments

Validates

Attachments

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| **PA** | MVI Search: Negative Response, Create Contact | **Search By Traits - Negative**- SSN 333*mmddyy*, NOSUCH CUSTOMER  Click the PATIENT SEARCH tool on the banner. Verify a new session is created with label MVI SEARCH  Enter the errant SSN/First/ Last in the Section 1 fields. Hit Search in Section 1.  Verify no hit is returned in Section 3 (Your search in MVI did not find any records matching the search criteria.)  Verify the Create Contact button is displayed under the Veteran Not Found? heading. |

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|  |  | Click the Create Contact  button. Verify an error popup displays instructing you to enter a DOB.  Enter a valid DOB. Click Create Contact.  Verify a new Veteran session is displayed with the data entered in the MVI Search (ssn, name, DOB)  Dismiss the session tab**(I don't know what to do with a customer created this way)** |
| **PA** | MVI Search: Traits | **Search By Traits**- e.g., SSN 333946512, ANDREW VCCMBRONSON  Click the PATIENT SEARCH tool on the banner. Verify a new session is created with tab label MVI SEARCH  Enter the SSN/First/Last in the Section 1 fields. Hit Search in Section 1.  Verify hit returned corresponds to the intended Veteran (takes a few seconds).  Verify the facilities load after the customer hit is received (takes a few seconds).  Verify at least one facility is listed under the veteran hit. |
| **PA** | MVI Search: Additional Traits | **Search By Traits -**  **Addn'l Search Criteria**- e.g., SSN 333624237 Last: VCCMALBERTS  MotherMaiden: LAROCHE |

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|  |  | Click the PATIENT SEARCH  tool on the banner. Verify a new sessionis created with label MVI SEARCH  Enter the SSN and Last Name in the Section 1 fields.  Expand the Additional Search Criteria. Enter the Mother's Maiden Name field.  Hit Search in Section 1.  Verify a hit is returned in Section 3. Wait for facilities to populate. Verify at least one facility is listed.  Click the Reset button in Section 1. Verify all fields in Sections 1 & 3 are cleared. |
| **PA** | MVI Search: EDIPI,  Sensitive, Multiple Facilities | **Search By EDIPI** - **1607998538, VCCMDUNN, KENNETH**  Enter the EDIPI in the Section 2 field. Hit Search in Section 2.  Verify hit returned corresponds to the intended Veteran, and facilities expose under the hit.  Verify multiple facilities (988- DAYT20 and 991-SLC4) are  listed under the veteran hit in Section 3.  Double-click a facility.  Verify  the MVI SEARCH session is renamed to the Vet's name, |

**Step 3**

**Execution Step**

Description\*

the Veteran Alerts session tab is active, and

integrations proceed (i.e., load spinners).

Perform acknowledgement (sensitive veteran) when the warning displays.

Expected Results

Per "verify" statements in the procedure. Comments

Validates

Attachments

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| **PA** | Navigation: Session Tabs | Verify the session label is now the veteran's name, and two session tabs are present (Veteran & Medical Charts)  Verify the active session tab is Veteran, and veteran information is displayed.  Click the Medical Charts session tab. Verify the focus changes to that tab (vertical set of chart buttons).  Dismiss the Medical Charts session tab (X in tab label). Verify the tab dismisses and Veteran tab is active.  Click the Create Interaction button on the top/left of the session window.  Verify an Interaction session tab is created. Dismiss it. |

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|  |  | Verify the tab dismisses and  Veteran tab is active. |
| **PA** | Navigation: Sessions | Select PATIENT SEARCH  from the banner.  Verify a **new**session is created with label MVI SEARCH, and that it has focus (highlighted tab).  Verify the previous session with the loaded veteran is still available/selectable, but not in focus.  Add a third session by clicking ANONYMOUS ROC from the banner and waiting for it to build.  Verify the previous sessions are still available/selectable, but not in focus.  Add a fourth session by clicking DASHBOARDS from the banner and waiting for it to build.  Verify the previous sessions are still available/selectable, but not in focus.  Add a fifth session by clicking DASHBOARDS again from the banner and waiting for it to build.  Verify the previous sessions are still available/selectable, but not in focus.  Attempt to add a sixth session by clicking any tool from the banner. |

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|  |  | Verify the warning for  Session Count Exceeded pops up. Acknowledge it.  Dismiss the most recent four sessions, leaving only the veteran you loaded earlier. |
| **PA** | Navigation:  Session Tab Toolbar | Select the Create Interaction button at the top of the session tab.  Verify a New Interaction session tab is opened.  Verify the SAVE tool is displayed near the top of the session tab.  Note - other tools will appear there as the test progresses, like ASSIGN TO SELF, ACCEPT RESOLUTION, etc. |
| **PA** | Navigation:  Side Navigation Pane | While still in the New Interaction session tab, click the ">" icon at the top left of the session tab window.  Verify the side navigation pane exposes, and lists specific summary data for the Veteran.  Collapse the side navigation pane by clicking the "<" icon to the top/right of the pane.  Verify the pane is now collapsed. |
| **PA** | Navigation: Form Basics | While still in the New Interaction session tab, click any section title (leftmost blue headers).  Verify the section will expand/collapse with subsequent clicks. |

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|  |  | Enter CTRL-S to attempt to  save the interaction. Verify a Save was attempted:  A diagnostic warning is displayed in the bottom/right next to the Save icon.  An error icon is displayed next to each required field with a prompt message popup. |
| **PA** | Navigation: Keyboard Shortcuts | While still in the New Interaction session tab, verify that the following keyboard shortcuts are functional:  Move through fields within the forms: Tab  Move to the previous option, option group, or field: Shift + Tab  Open or select a field: Enter  Move between options in an open list: Arrows  Close field value option or cancel command: Esc  Manually refresh the page: F5 |

Expected Results

Per "verify" statements in the procedure. Comments

Validates

Attachments

**Step 4**

**Execution Step**

Description\*

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| **PA** | Veteran: Flashes/Sensitivity | Veteran Flashes: Load MIMS, BOB - **SSN 333363333**using PATIENT  SEARCH, Preferred Facility  Verify the **Deceased Veteran** warning displays during load. Acknowledge it. Dismiss session.  **Veteran Flashes:**Load VCCMBYRD, PETER - **EDIPI1607998511**using PATIENT SEARCH,  Preferred Facility  Verify the **High Risk For Suicide**warning displays during load. Acknowledge it. Dismiss session.  **Sensitive Veteran**: Load  **VCCMCAMPBELL CRAIG**  - **SSN333836565**using PATIENT SEARCH  Verify the **Sensitive Veteran** warning displays during load, advising of audit logging. Acknowledge it. |
| **PA** | Veteran:  Form, Warnings | After the Veteran loads (from the previous step), verify  the **Veteran**session tab is displayed.  Verify warning banners: V***et Facility is not the same as User's***, and ***Home facility does not have a VISN***. |
| **PA** | Veteran: Summary | Verify the SSN, DoB, NoK, and Remarks are populated in the **Summary**VETERAN INFORMATION  Verify the PHONE NUMBERS & CURRENT |

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|  |  | ADDRESS are populated  (not the mobile phone)  Verify the FACILITY INFO is populated (not the VISN).  Verify the TEMPORARY ADDRESS is unpopulated, and when you click it, all fields are locked. |
| **PA** | Veteran:  Provider Information | Verify that the **Provider Information**section presents expanded.  Verify a PACT is assigned and the selection is locked.  Verify a PCP is assigned and locked.  Verify members of the PACT are identified (name and role) in the grid displayed. |
| **PA** | Veteran: Contact History | Verify that the **Contact History**section presents expanded.  Verify the history grid lists all contacts associated with this Veteran, to include:  Contacts from VEFT/ VOICE  Contacts from ROCs on Interactions  Contacts from Activities entered on Requests |
| **PA** | Veteran:  Eligibility Information | Verify the **Eligibility Information**section is exposed; all fields are locked:  Primary Eligibility Code: SC 50-100% |

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|  |  | Enrollment Priority Group: null  Patient Type: Veteran Service Connected: Yes SC Percent: 50 Unemployable: false Dental Injury: null Medication Co-Pay: null  Outpatient Visit Co-Pay: null  Is Veteran Insured: No |
| **PA** | Veteran:  Communication Preferences  & Transportation | Verify the **Communication Preferences & Transportation**section presents collapsed. Expand it by clicking on it.  Toggle any of the info on the section.  Verify the Disk icon at the bottom right flashes "unsaved changes".  Click on the save icon (bottom/right) or click CTRL- S.  Verify the form saves. Optional:  Click PATIENT SEARCH  and reload the customer in a new session. |

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|  |  | Expand  the**Communication Preferences & Transportation**section.  Verify that the info you toggled has been saved in VEFT.  Dismiss this new session. |
| **PA** | Veteran:  Interaction Summary | Verify that the **Interaction Summary**section presents collapsed. Expand it by clicking on it.  Verify the summary is populated with Interactions.  Optional:  Sort on every field except Details. Verify the Interaction Summary is sortable.  Verify pagination: click on the blue triangle to go to susequent pages. |
| **PA** | Veteran:  **Live Updates** | Click on the Create Interaction button at the top/ left of the Veteran session tab.  Verify the new Interaction session tab builds and focuses.  Fill out required fields in ROC section. Click Save. Verify the Interaction saves without error.  Open the Veteran session tab and refresh (F5). Wait for refresh to complete.  Expand the Contact History and verify the contact info |

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|  |  | from the new interaction is  displayed in the grid.  Expand the Interaction Summary and verify the new interaction is displayed in the grid. |
| **PA** | Medical Charts: General | Load **VCCMDINKEBERRY, FRED** - **EDIPI 1607998503**(SCDs, Notes  with Addendum)  Click Session  **VCCMDINKEBERRY,**  **FRED**and click the Medical Chart session tab.  Verify the Medical Chart session tab opens and provides a vertical set of buttons.  Click on any of the buttons and verify the "busy spinner" displays while in progress.  Verify the information loads and is displayed in grid format. |
| **PA** | Medical Charts: Setup | Load **VCCMDINKEBERRY, FRED** - **EDIPI 1607998503**(SCDs, Notes  with Addendum)  Load **VCCMSMITH, FRANK**  - **EDIPI 1607998520 -**  Facility **987 - CHEY6** (all charts except Imaging/Labs) **FAILING SCDs**  Load**VCCMALBERTS, GEORGESSN 333624237**  (has Imaging and Labs)  Load**VCCMCASEY, BRIANSSN 333871234**  (has Discharges) |

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| **PA** | Medical Charts: SCD button, Problems button | Click Session  **VCCMDINKEBERRY,**  **FRED**and click the Medical Chart session tab.  Click the **SC Disabilities**button.  Verify Eligibility and Individual Disability grids build/populate (50-100%  - 50% Hearing loss, 30% PTSD)  Click the**Problems**button.  Verify Active Problems grid builds/populates (5 entries). |
| **PA** | Medical Charts: Notes button, Addendum | Continue Session  **VCCMDINKEBERRY,**  **FRED**and click the Medical Chart session tab.  Click the **Notes**button.  Verify Notes grid builds/ populates (several paged entries).  Click on any Info icon in the Note Text column.  Verify the Notes Detail modal builds. Close the modal.  **Addendum:**  Click on the Addendum column header until the addenda are on top.  Click one of the Addenda. Verify the Author/Date/ Content are dislayed.  Click on the popup line.  Verify the Addendum Detail |

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|  |  | is displayed. Close the  popup modal. |
| **PA** | Medical Charts: Notes button,  Dates / Sort / Search / Pagination / Filter | Continue Session  **VCCMDINKEBERRY,**  **FRED**on the Medical Chart session tab.  **Sort:**  Click on any column header. Verify all lines are sorted in A-Z order.  Click the same header.  Verify all lines are sorted in reverse order.  **Date Range:**  Observe # entries being displayed.  Restrict date range: set End Date before most recent entry Date. Click**Reload Data**. Verify fewer entries now.  Extend date range: restore End Date & set Start year to 2015. Click**Reload Data**.  Verify more entries now.  **Search:**  Enter "substance" in the Search box. Verify only entries with that string (not case sensitive) are displayed.  Clear the Search box.  Verify grid reverts to original entries.  **Filter:**  Click the filter box at the bottom of the Facility column. |

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|  |  | Wherever you see this box,  you can filter.  Select one of the facilities to filter. Verify only records for that facility are displayed.  Clear the filter by selecting the top (blank) option.  Verify grid reverts to original entries.  **Pagination:**  Select the Next (or 2) button to see the second page. Select Previous (or 1) to go to the original page.  In the Show (top/left) pulldown, select 100 entries per grid. Verify grid redraws with all data. |
| **PA** | Medical Charts: Orders button, Appointments button, Medications button | Continue Session  **VCCMDINKEBERRY,**  **FRED**on the Medical Chart session tab.  Click the **Orders**button. Verify grid builds/populates.  Click on the Info icon for any Order. Verify the Orders Detail modal builds. Dismiss the modal.  Click the**Appointments**button. Verify grid builds/populates.  Extend date range: set Start year to 2015. Click Reload Data. Verify more entries now.  Click the**Medications**button. Verify grid builds/populates. |

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|  |  | Click on the Info icon  for any entry Verify the Medications Detail modal builds. Dismiss the modal. |
| **PA** | Medical Charts: Postings button, Allergies button, Labs button, Consults button,  Non-VA Meds button, Vitals button | **Click tab:** Session  **VCCMREYNOLDS,**  **GARY**and click the Medical Chart session tab.  Click the **Postings**button.  Verify Postings grid builds/ populates (several paged entries).  Click on any Info icon in the Posting/Special Message column. Verify the Detail modal builds. Close the modal.  Click the**Allergies**button.  Verify grid builds/ populates (2 entries).  Click on any Info icon in the Causative Agent column. Verify the Detail modal builds. Close the modal.  Click the **Labs**button.  Verify grid builds/ populates (7 entries).  Click on any Info icon in the Results column. Verify the Detail modal builds.  Close the modal.  Click the**Consults**button.  Verify grid builds/ populates (2 entries). |

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|  |  | Click the**Non-VA**  **Meds**button.  Verify grid builds/ populates (2 entries).  Click the**Vitals**button.  Verify grid builds/ populates (10 entries). |
| **PA** | Medical Charts: Imaging button | **Click tab:** Session  **VCCMALBERTS,**  **GEORGE**and click the Medical Chart session tab.  Click the **Imaging**button.  Verify grid builds/ populates (several paged entries).  Click on any Info icon in the Report column. Verify the Detail modal builds.  Close the modal. |
| **PA** | Medical Charts: Discharges button | **Click tab:** Session  **VCCMCASEY, BRIAN**and  click the Medical Chart session tab.  Click the **Discharges**button.  Verify grid builds. Set Start Date to 2016 and click **Reload Data**. Verify grid populates (one entry).  Click on any Info icon in the Note column. Verify the Detail modal builds. Close the modal. |

Expected Results

Per "verify" statements in the procedure. Comments

Validates

Attachments

**Step 5**

**Execution Step**

Description\*

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| **PA**  **PA** | Dashboard: General  Dashboard:  Unassigned VEFT Interactions | Click on the DASHBOARDS tool in the banner.  Verify the DASHBOARD session is displayed with four containers (grids).  Verify the user can expand the dashboard selection dropdown, and selections include:  **Patient Advocate Dashboard**  Verify the first grid view defaults to**UnassignedVEFT Interactions at My VAMC**.  Verify the second grid view defaults to **Unassigned Interactions at My VAMC**.  Verify the third grid view defaults to **My Requests Due for PA**.  Verify the fourth grid view defaults to **My Interactions In Progress for PA**.  Verify the first grid view defaults to **UnassignedVEFT**  **Interactions at My VAMC**.  Verify the grid shows all VEFT Interactions in the user’s Facility that do not have an Assigned PA. |

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|  |  | Verify the default sort is  by Priority (1-Crisis on top) then by Interacted On (oldest on top).  Verify other views include:  **Assigned VEFT Interactions at My VAMC**  - Interactions in the user’s Facility that have an Assigned PA |
| **PA** | Dashboard:  Unassigned Interactions | Verify the second grid view defaults to **Unassigned Interactions at My VAMC**.  Verify the grid shows all Interactions in the user’s Facility that do not have an Assigned PA  Verify the default sort is by***Interacted On***(oldest on top).  Verify there are no other view selections. |
| **PA** | Dashboard: My Requests | Verify the third grid view defaults to **My Requests Due for PA**.  Verify the grid shows all closed Requests where the user is the Patient Advocate on the parent Interaction.  Verify the default sort is by***Due Date***(oldest on top).  Verify other views include:  **Closed Requests at My VAMC** - shows all  closed Requests in the user’s facility.  **My Closed Requests for PA**- shows all closed |

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|  |  | Requests where the user  is the PA on the parent Interaction  **Requests Due at My VAMC**- shows all active Requests in the user’s facility. |
| **PA** | Dashboard:  My Interactions | Verify the fourth grid view defaults to **My Interactions In Progress for PA**.  Verify the grid shows all active Interactions where the user is the Patient Advocate  Verify the default sort is by***Interacted On***(oldest on top).  Verify other views include:  **Closed Interactions at My VAMC**- shows all closed Interactions n the user’s facility  **My Closed Interactions for PA**- shows all closed Interactions where the user is the PA  **Interactions In Progress at My VAMC**- shows all active Interactions in the user’s facility with an Assigned PA |
| **PA** | Dashboard: **Live Updates: My Interactions** | Scroll to view the fourthgrid: My Interactions In Progress for PA  Note the total number of interactions in this grid.  Select any live veteran session and click on the Veteran session tab. |

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|  |  | Select the Create Interaction  button at the top/left of the session tab.  Verify a new Interaction session tab is added and is in focus.  Selec t Method of Contact = Phone, Facility = 629, and provide Contacting Entity info.  Click Save. Note that your user name has auto- populated in the Patient Advocate field.  Click the Dashboard session and refresh (F5).  Note that the total number of interactions in the**My**  **Interactions In Progress for PA**grid has incremented.  Sort the grid to place the most recent interaction on top. Verify it is the  interaction recently created. |
| **PA** | Dashboard:  **Live Updates: Unassigned Interactions** | Scroll to the **Unassigned Interactions at My VAMC**grid in the Dashboard.  Note the total number of interactions in the grid.  Return to the Interaction session tab for the selected veteran session.  Delete the Patient Advocate selection and leave it blank. Click Save.  Click the Dashboard session and refresh (F5). |

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|  |  | Note that the total number of interactions in  the**Unassigned Interactions at My VAMC**grid has incremented.  Sort the grid to place the most recent interaction on top. Verify it is the  interaction recently created. |
| **PA** | Dashboard:  **Live Updates:**  **Unassigned VEFT Interactions** | Scroll to the **Unassigned VEFT Interactions at My VAMC**grid in the Dashboard.  Note the total number of interactions in the grid, as well as the **Unassigned VEFT Interactions at My VAMC**grid.  Return to the Interaction session tab for the selected veteran session.  Set the Method of Contact = VEFT. Note that the Method of Contact Detail field is now required.  Enter any text in the Detail field. Click Save.  Click the Dashboard session and refresh (F5).  Note that the total  # of interactions in the**Unassigned Interactions at My VAMC** grid has decremented.  Note that the total # of interactions in the **Unassigned VEFT**  **Interactions at My VAMC**  grid has incremented. |

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|  |  | Sort the grid to place the most recent interaction on top. Verify it is the  interaction recently created. |
| **PA** | Dashboard:  **Live Updates:**  **My Requests Due for PA** | Scroll to the **My Requests Due for PA**grid in the Dashboard.  Note the total number of interactions in the grid.  Return to the Interaction session tab for the selected veteran session.  Set the Patient Advocate field to yourself and click Save.  Create a self-assigned Request:  Scroll to the Request Detail section of the Interaction form.  Enter "Regression  <date>" in the Request Description.  The Request Facility and Sub-Facility to 629.  Leave the Service Line and Assign to VPAC fields untouched.  Set the Priority to 1-Crisis. Verify that the Request  Date is today, and the Due  Date is 10 business days from today.  In the Code field, type "SC01" and hit return. The |

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|  |  | "SC01 - Not Treated..." code  auto-populates. Select it.  Click the**Add Request**button.  Verify the new request is displayed in the Request  Summary (may need to sort by Created On) descending  Verify the new request has Status Reason In Progress.  In the Dashboard session, refresh**My Requests Due for PA**(right-click in the grid and select Refresh).  Note that the total # of requests in the **My Requests Due for PA** grid has incremented.  Sort the grid to place the most recent request on top. Verify it is the request recently created. |
| **PA** | Dashboard:  Work Process: Claim a VEFT Interaction for work | Scroll to the **Unassigned VEFT Interactions at My VAMC**grid in the Dashboard.  Note the total number of interactions in the grid.  Open one of the Interactions by double clicking on the row (in the white space).  Verify the DASHBOARD session is renamed to the veteran you selected, and the Interaction session tab is active. |

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|  |  | Set the Patient Advocate  field to yourself and click Save. Note the Interaction ID.  Open a new DASHBOARD session. Verify the number of**Unassigned VEFT Interactions**has decremented.  Scroll to **My Interactions**and verify the Interaction ID is now listed in that grid.  Dismiss the veteran session you opened. |
| **PA** | Dashboard:  Work Process: Claim a manual Interaction for work | Scroll to the **Unassigned Interactions at My VAMC**grid in the Dashboard.  Note the total number of interactions in the grid.  Open one of the Interactions by double clicking on the row (in the white space).  Verify the DASHBOARD session is renamed to the veteran you selected, and the Interaction session tab is active.  Set the Patient Advocate field to yourself and click Save. Note the Interaction ID.  Open a new DASHBOARD session. Verify the number of**Unassigned Interactions**has decremented. |

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|  |  | Scroll to **My**  **Interactions**and verify the Interaction ID is now listed in that grid.  Dismiss the veteran session you opened. |
| **PA** | Dashboard:  Work Process: Take back a Request from a SL | Scroll to the **My Requests Due for PA**grid in the Dashboard.  Note the total number of requests in the grid.  Open one of the Requests by double clicking on the row (in the white space).  The request must have Status Reason isAssigned(i. e., to a Service Line)  Verify the DASHBOARD session is renamed to the veteran you selected, and the Interaction session tab is active.  After it builds, verify the ASSIGN TO SELF tool is displayed in the session toolbar. Click it.  Verify a modal pops up allowing you to assign to yourself or someone else. Verify Assign to me. Click Assign.  Verify the status moves from Assigned to In Progress.  Delete the Code selection (if any). Click Save. |

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|  |  | Scroll down to the Notes and  Resolutions section. Add a Note activity:  Select Activity Type = Note, Method = Phone, Activity Description = any text. Click the Add Activity button.  Verify the Note shows up in the Activities grid to the right.  Click the Resolve Request button. Verify a warning banner displays saying you need a Resolution Activity. |
| **PA** | Dashboard:  Work Process: Resolve a Request | In the Notes and Resolutions section. Add a Resolution activity:  Select Activity Type = Resolution, Method = Email, Description = any text. Click the Add Activity button.  Verify the Resolution shows up in the Activities grid to the right.  Click the Resolve Request button.  Verify the warning banner clears, and the Status Reason goes from In Progress to Resolved.  Scroll up to the top of the form and select ACCEPT RESOLUTION from the session tool bar. Click OK.  Verify a popup advises that you need a Code to close the request. Supply one (e.g., SC01) and Save. |

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|  |  | Select ACCEPT  RESOLUTION from the session tool bar. Click OK.  Verify the Status Reason goes from Resolved to Closed, and the record becomes read-only (banner at bottom).  Note the Request ID.  Open a new DASHBOARD session. Verify the number of **My Requests Due for PA**has decremented.  Select the **My Closed Requests for PA** view and verify the Request ID is now listed atop the grid. |
| **PA** | Dashboard:  Work Process: Resolve an Interaction | Return to the Request session tab in the veteran session you were working.  Scroll to the Report of Contact section. Verify the details from the parent interaction are displayed.  Click on the Interaction link. Verify the Interaction tab is built and in focus.  Scroll down to the Request Summary section and review the Requests in the grid displayed.  Verify the Request you just worked is listed with Status Reason = Closed.  If there are other Requests listed, resolve/close them as described in the previous step. |

You can open the requests from this grid by double- clicking in the white space on the row.

Return to the Interaction tab and refresh the Request Summary grid

Right-click in grid white space and select Refresh List, or you can refresh the whole tab with F5

When all Requests are Closed, click the Close Interaction button at the top/ left of the Interaction session tab.

Verify a popup requires you to acknowledge the action. Click OK.

Verify the Status Reason goes to Inactive, and the record becomes read-only (banner at bottom).

Note the Interaction ID.

Open a new DASHBOARD session. Verify the number of **My Interactions In Progress for PA**has decremented.

Select the **My Closed Interactions for PA** view and verify the Interaction ID is now listed atop the grid.

Expected Results

Per "verify" statements in the procedure. Comments

Validates

Attachments

**Step 6**

**Execution Step**

Description\*

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| **PA** | Anonymous ROC: Interaction Form:  Report of Contact | Dismiss all sessions. Click ANONYMOUS ROC from the banner.  Verify a new ANONYMOUS ROC session is created and focus is in an Interaction session tab.  Verify the Status Reason initializes to Open.  Verify the Description field is required (attempt to save and observe banner warning).  In the Report of Contact section, set Description = "Regression <date>"  Click the Method of Contact pull-down. Verify several contact options are presented. Select Other(bottom).  Verify that the Method of Contact Detail is now displayed and required.  Click the Method of Contact pull-down. SelectPhone.  Verify that the Method of Contact Detail is now hidden.  Click the Method of Contact pull-down. Verify several contact options are presented. SelectVEFT.  Verify that the Method of Contact Detail is now |

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|  |  | displayed and required.  Enter "Regression <date>".  Verify that, when you select the VEFT Method of  Contact, a new subsection is displayed:  VEFT SURVEY  INFORMATION, all fields locked except Priority  note that these fields are populated when electronic ROCs come in through VEFT/VOICE  Click the Method of Contact pull-down. SelectPhone.  Verify that the Method of Contact Detail and the VEFT SURVEY subsection are now hidden. |
| **PA** | Anonymous ROC: Interaction Form:  Report of Contact | Verify the Facility field is blank and required (attempt to save and observe banner warning).  Click the magnifying glass (or hit return while positioned in the field).  Verify the Facility pulldown populates with suggested facilities. Scroll down  and select Look Up More Records.  Verify the Look Up Record modal builds, Look for = Facility is greyed out.  Set Look in = Active Facilities. Set the Search field = 62 and hit return. |

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|  |  | Verify all facilities that start  with "62" are displayed.  Select629 - New Orleans, LAby clicking to the left of the row. Click Add.  Verify the Facility is now populated in the form.  Click the Type dropdown - verify selections are Regular (default), Clinical Appeal, and Caregiver Appeal.  Verify the PATS ROC Number field is editable (hook for tieing in legacy IDs). |
| **PA** | Anonymous ROC: Interaction Form:  Report of Contact | Verify the Date of Contact is autopopulated to today.  Click on the date/time. Verify selectors pop up to modify date and time.  Make selections. Verify your selections are reflected on the form.  Click date/time again.  Verify you can type in date/ time manually.  Verify the Complexity field is locked and set to Moderate.  Verify the Patient Advocate field is null (leave it unset for now).  Verify the Treatment Status pull-down selections:  Deceased, Outpatient, Inpatient, Long Term Care, |

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|  |  | Not Registered at this Site,  No Patient Associated.  Select Treatment Status = Outpatient. |
| **PA** | Anonymous ROC: Interaction Form:  Report of Contact | Under the CONTACTING ENTITIES subsection, verify the Entity=Patient, Name= Anonymous, and Number= null.  Verify the Entity and Name fields are required **(number shouldn't be required: See 714619)**.  Verify that you can modify the default: click the field and select Friend.  Verify the fields are reset  for the Friend and the name/ number are blank and required.  Restore the Entity back to Patient. Verify fields are reset, name is Anonymous, number blank and required.  Enter the phone number: "2023334444". Press Tab or click away.  Verify the phone number format is displayed as "(202) 333-4444" |
| **PA** | Anonymous ROC: Interaction Form:  Report of Contact | Click Save.  Verify that a system- generated Interaction ID has been assigned, formatted C- XXX.YYYYNNNNN where  XXX is the Facility code, |

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|  |  | YYYY is the 4-digit Fiscal  Year, and  NNNNN is a number that increments with each Interaction.  **NOTE THIS NUMBER. WE WILL BE RETURNING TO THIS INTERACTION OFTEN DURING THE TEST.**  Verify the Status Reason is now Assigned.  Verify that the Entity you had prepared (Veteran, Anonymous, Patient) is saved in the grid.  Verify the Add Contacting Entity button is now displayed. |
| **PA** | Anonymous ROC: Interaction Form:  Report of Contact | Verify the Patient Advocate field is auto-populated to your user name  Note: Only autopopulates when method is Phone  or Visit, and a PA wasn't specified before the save.  Click the Patient Advocate field and click the delete button.  Click Enter to populate a list of users eligible to work this request.  Verify that only users from your facility (629) are presented.  Set the Patient Advocate  to the PA Supervisor. Click |

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|  |  | Save. Verify Status Reason  is still Assigned.  Change the Patient Advocate back to yourself. Click Save. |
| **PA** | Anonymous ROC: Interaction Form:  Change Patient | Click on the Change Patient button at the top of the Interaction session tab.  Verify the MVI Search session tab is added and in focus.  Enter 1607998490 for the EDIPI and click Search.  Verify the ANDREW VCCMBRONSON vet is returned.  Double-click on the preferred facility. Verify the veteran loads successfully.  Verify that the session name has changed from ANONYMOUS ROC  to VCCMBRONSON, ANDREW.  Verify that the Veteran and Medical Chart session tabs have been added.  Click the Veteran session tab. Expand the Interaction Summary section.  Sort grid by Interacted On (reverse chronological order). Verify the new interaction is listed. |

Expected Results

Per "verify" statements in the procedure. Comments

Validates

Attachments

**Step 7**

**Execution Step**

Description\*

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| **PA** | Interaction Form: Contacting Entities | Under the CONTACTING ENTITIES subsection, select the Contacting Entity pull- down.  Select Entity = Directors Office. Note that the Name and Number are not required.  Click Add Contacting Entity. Verify the new contact is listed in the grid with only "Directors Office" on that row.  Repeat the above, but enter a name and phone number. Click Add Contacting Entity.  Verify the new contact is listed in the grid with the other details on that row.  Verify that the grid is now paginated (3 rows/page).  Click the blue triangle (bottom-right) to go to the second page. Verify original contact is displayed (Vet, Anon).  Select Entity =Central Office. Verify the Sub Contacting Entity is displayed and required. Click the pulldown.  Verify the options include VAIQ, EXECVA, Red Dot,  White House, Other. Select Other. |

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|  |  | Verify Contacting Entity Details is displayed/required. Enter text. Click Add Contacting Entity. Verify on grid.  Select Entity = Congressional. Verify the Contacting Entity Details is displayed/required.  Select Entity =VISN. Verify the VISN Details pull-down is displayed and required. Click the pulldown.  Verify the options include  25 numbered VISNs. Select any one.  Verify the Sub Contacting Entity is displayed and required. Click the pulldown. Select Other.  Verify Contacting Entity Details is displayed/required. Enter text.  Enter text for the Name and Number. Click Add Contacting Entity.  Verify on grid: all columns should be populated on this row. |
| **PA** | Interaction Form: Header/Footer | Verify that, while scrolling through the form, the Interaction Header and Footer remain anchored.  Verify that the Header contains the Interaction ID and Status Reason of the Interaction (Open) |

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|  |  | Verify that the Interaction  Footer contains the following:  Created On – The date/ time the Interaction was initially saved.  Created By – The user that created the Interaction.  Owner – The current owner of the Interaction.  Patient - the patient for this interaction  Verify you can quickly get to customer details by exposing the left info pane (">" on top/ left). Hide the pane. |
| **PA** | Interaction Form: Create Request: Named Employees | Scroll to the Request Detail section.  In the NAMED EMPLOYEES subsection (on the right), enter a first/ last/email (any). Click Add Named Employee.  Verify a new row is added to the named employee grid with the data you entered.  Click the "+" button over the named employee grid. Verify the user selector pulldown is displayed.  Select the magnifying glass icon. Scroll down and select Lookup More Records.  Verify the Named Employee finder modal builds. Select one by clicking next to a row (under the checkmark). |

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|  |  | Click the Select button, and  verify the selected record populates under Selected Records. Click Add.  Verify that the saved Named Employee is added to the grid. |
| **PA** | Interaction Form: Create Request: PA | Select the Add Request button. Verify the banner populates with errors  for missing Priority and Description.  Verify the Request Date is pre-set to today, and the Due Date is set to 10 working days from today.  Verify you can modify either date.  Verify the Request Facility and Sub Facility are pre- populated to 629.  Verify the Assigned Service Line = null, Assign to VPAC  = No, Priority = null, and Code = null  In the Request Description, enter "Regression <date> Any PA". Select Priority = 1- Crisis.  Click the Add Request button.  Verify the new request populates in the Request Summary grid:  Request Number is the Interaction ID + "-01"  Sub Facility = 629 |

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|  |  | Assigned SL = blank  Created On = today, just now  Status Reason = In Progress  Resolved On = blank Code = blank Request Description =  "Regression <date> PA"  Resolution Description = blank  Verify that the Request Detail fields are cleared so you can add additional Requests. |
| **PA** | Interaction Form: Create Request: Work by PASUP | Verify that the Request Detail fields have reset so you can add another one:  Description, Sub Facility, and Priority have been reset to null.  Named Employee grid is empty.  Assigned Service Line = null, Assign to VPAC = No, and Code = null  Add a request to be worked by a PA:  Description: "Regression  <date> PASUP"  Sub Facility: click magnifying glass icon, select 629 - New Orleans, LA |

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|  |  | Priority: 2-Emergent.  Code: enter "sc01" and press return. Select the returned record.  Click the Add Request button.  Verify the new request populates in the Request Summary grid:  Request Number is the Interaction ID + "-02"  Sub Facility = 629BY Assigned SL = blank Created On = today, just  now  Status Reason = Assigned Resolved On = blank Code = SC01 - "Not  Treated with Dignity..."  Request Description = "Regression <date> PASUP"  Resolution Description = blank |
| **PA** | Interaction Form: Create Request: Work by SL | Verify that the Request Detail fields have reset so you can add another one.  Add a request to be assigned to a Service Line:  Description: "Regression  <date> SL" |

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|  |  | Sub Facility: click  magnifying glass icon, select 629BY - Baton Rouge, LA  Assigned Service Line: click magnifying glass icon, select Administrative  Priority: 2-Emergent.  Code: enter "sc01" and press return. Select the returned record.  Click the Add Request button.  Verify the new request populates in the Request Summary grid:  Request Number is the Interaction ID + "-03"  Sub Facility = 629BY Assigned SL =  Administrative  Created On = today, just now  Status Reason = Assigned Resolved On = blank Code = SC01 - "Not  Treated with Dignity..."  Request Description = "Regression <date> SL"  Resolution Description = blank |
| **PA** | Interaction Form:  Create Request: | Verify that the Request Detail fields have reset so you can add another one. |

Work by SLA Add a request to be assigned to a Service Line:

Description: "Regression

<date> SLA"

Sub Facility: click magnifying glass icon, select 629BY - Baton Rouge, LA

Assigned Service Line: click magnifying glass icon, select Administrative

Priority: 2-Emergent.

Code: enter "sc01" and press return. Select the returned record.

Click the Add Request button.

Verify the new request populates in the Request Summary grid:

Request Number is the Interaction ID + "-04"

Sub Facility = 629BY Assigned SL =

Administrative

Created On = today, just now

Status Reason = Assigned Resolved On = blank Code = SC01 - "Not

Treated with Dignity..."

Request Description = "Regression <date> SLA"

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|  |  | Resolution Description = blank |
| **PA** | Interaction Form: Create Request: Work by VPAC | Verify that the Request Detail fields have reset so you can add another one:  Add a request to be assigned to a VPAC:  Description: "Regression  <date> VPAC"  Sub Facility: click magnifying glass icon, select 629BY - Baton Rouge, LA  Assign to VPAC: Yes - Verify the "Assigned Service Line" field locks when this selection is made  Priority: 2-Emergent.  Code: enter "sc01" and press return. Select the returned record.  Click the Add Request button.  Verify the new request populates in the Request Summary grid:  Request Number is the Interaction ID + "-05"  Sub Facility = 629BY Assigned SL = blank Created On = today, just  now  Status Reason = Assigned |

**Step 8**

**Execution Step**

Description\*

Resolved On = blank

Code = SC01 - "Not Treated with Dignity..."

Request Description = "Regression <date> VPAC"

Resolution Description = blank

Expected Results

Per "verify" statements in the procedure. Comments

Validates

Attachments

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| **PA** | Request Form:  Open a Request from Interaction | In the Request Summary grid, find and double-click the "PA" Request:  Request Number<Interaction ID>-01,  Description "Regression  <date> PA"  Verify the Request session tab is added and has focus. Verify the Status is In Progress.  Verify the Resolve Request button is displayed under the Add Activity button in the Notes & Resolutions section.  Verify the Request Header and Footer remain anchored when you scroll through the Request form. |

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|  |  | Verify you can quickly get to  customer details by exposing the left info pane (">" on top/ left). Hide the pane. |
| **PA** | Request Form: ROC section | Scroll down to the Report of Contact section. Verify  you can collapse/expand the section.  Verify the original details from the ROC Interaction are displayed in this section.  Verify that none of the ROC fields can be modified on the Request form.  Verify that all of the Contacting Entities are displayed in the grid under the ROC details.  Click on the Interaction link ("C-629.2018xxxxx").  Verify the original Interaction session tab is rebuilt and has focus.  Modify the Treatment Status. Add another Contacting Entity. Click Save.  Return to the Request session tab. Click F5 to refresh the session tab. Scroll back down to the ROC section.  Verify the Treatment Status has changed and a new Contacting Entity was added. |
| **PA** | Request Form:  Add Named Employee | Scroll up to the Request Detail section. |

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|  |  | In the NAMED  EMPLOYEES subsection (on the right), enter a first/ last/email (any). Click Add Named Employee.  Verify a new row is added to the named employee grid with the data you entered.  Click the "+" button over the named employee grid. Verify the user selector pulldown is displayed.  Select the magnifying glass icon. Scroll down and select Lookup More Records.  Verify the Named Employee finder modal builds. Select one by clicking next to a row (under the checkmark).  Click the Select button, and verify the selected record populates under Selected Records. Click Add.  Verify that the saved Named Employee is added to the grid. |
| **PA** | Request Form: Add Activities | Scroll to the Notes and Resolutions section. Add activities:  Type = **Note,** Method = **Phone,**Description = any. Click Add Activity. Verify addition to Activities grid (right).  Type =**Note,** Method =  **Comment Card,**Description  = any. Add Activity. Verify addition to Activities. |

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|  |  | Type =**Patient Contact,**  Method = **Phone,**Description  = any. Add Activity. Verify addition to Activities.  Type =**Patient Contact,** Method = **Social Media,**Description = any.  Add Activity. Verify addition to Activities.  Type =**Note,** Method = **Phone,**Description = any. Add Activity. Verify addition to Activities.  Verify the pagination controls display after adding the fifth activity, and you can get to subsequent pages.  Add another activity, but pre- date (click on Activity Date and use calendar to set to last week).  Sort the Activities grid in reverse chronological order.  Verify the "Date" is different from "Created On" for the pre-dated activity. |
| **PA** | Request Form: Resolve Request | Click the Resolve Request button. Verify a warning banner displays saying you need a Resolution Activity.  In the Notes and Resolutions section. Add a Resolution activity:  Select Activity Type = Resolution, Method = Email, Description = any text. Click the Add Activity button. |

**Step 9**

**Execution Step**

Description\*

Verify the Resolution shows

up in the Activities grid to the right and the warning banner clears.

Click the Resolve Request button.

Verify the Status Reason goes to Closed, and the record becomes read-only (banner at bottom).

Expected Results

Per "verify" statements in the procedure. Comments

Validates

Attachments

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| **PA** | Reports:  Run a Report | Click on REPORTS in the USD banner. Verify a new session is created labelled REPORTS.  Verify the VEFT Reports grid is displayed in the Shared Reports session tab.  Verify the grid populates with prepared report templates.  Select the Test Report for Training report (click on the left of the row under the checkmark)  Verify the RUN REPORT tool exposes in the session tab toolbar. Click RUN REPORT. |

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|  |  | Verify the report is generated  and displayed in the session tab.  Verify the Edit Filter button displays.  Verify tools are presented for the report: pagination, zoom, search, export, refresh, and print.  Hover over each graphical tool and verify tips pop up indicating the function of each tool. |
| **PA**  **PA** | Reports: Navigation  Reports: Export | Verify you can get to subsequent pages and return to the beginning of the report.  Verify you can change the zoom level for the report. Set the zoom to Whole Page.  Find something recurring in the report and enter it in the search box (e.g., "2018010").  Click the Find button. Verify the first occurence is highlighted.  Click the Next button. Verify the second occurence is highlighted.  Click the Refresh icon. Verify the report regenerates.  Click the Print button. Verify printing is not avaialble.  **Sprint 22 change?**  Click on the Export tool dropdown.  Verify several export options are provided (XML, CSV, |

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|  |  | PDF, MHTML, Excel, TIFF,  Word)  Select the Acrobat (PDF) file export option. Open the file in the File Download popup.  Verify the report opens in the Acrobat Reader.  Dismiss the Acrobat application and return to the report. |
| **PA** | Reports: Modify Filter | Click the Edit Filter button. Verify the Report Filtering Criteria are displayed.  Hover over the Method of Contact selection and click on the button with "…".  Verify the Select Values modal appears.  Add Method of Contact values by selecting some (hold CTRL down) and clicking the ">>" button.  Verify the selected methods appear at the right under Selected Values. Click OK.  Verify the mdthods you selected are now included in the filter:  Hover over the selections to the left of the "..." button and the tooltip popup will list them.  Select the dropdown to the right of the Patient Advocate filter. Select "Contains Data".  Click the Run Report button at the bottom right. |

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|  |  | Verify the report is regenerated, and has more pages than originally. |
| **PA** | Reports:  Read-only Filter | Dismiss the REPORTS session and regenerate the same report.  Click the Edit Filter button.  Verify the filters returned to their original values. |

**Associated E-Signatures**

Expected Results

Per "verify" statements in the procedure. Comments

Validates Attachments

**Signed Action Signer Comment Additional Information**