[**176406: VCCM\_6\_S#687707\_UX: Streamline Request and Progress Note**](https://clm.rational.oit.va.gov/qm/service/com.ibm.rqm.integration.service.IIntegrationService/resources/FtP%2B%28QM%29/executionscript/VEMS_6_S687707_UX%3A__Streamline_Request_and_Progress_Note_Formssave_to_vista_issues)[**Forms**](https://clm.rational.oit.va.gov/qm/service/com.ibm.rqm.integration.service.IIntegrationService/resources/FtP%2B%28QM%29/executionscript/VEMS_6_S687707_UX%3A__Streamline_Request_and_Progress_Note_Formssave_to_vista_issues)



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Originator: Pribyl, Brent (BAH) Owner:

Type: Manual

Test Data: Unassigned

Description: 1. Horizontal CRM tabs (blue headers) on request form will have matching links/buttons across top of Request form (below request ribbon). There will be one button for each CRM tab (blue header) on the form.

1. Create a new collapsible Section for Progress Notes on the Request form
   1. Do not open a separate tab for new progress notes
   2. Add Note type field: Drop down should have the following options:

* Historical
* Workload
* CRM only
  1. Allow user the flexibility to change Note Type when necessary

1. The body of the progress note will be displayed next
   1. Keep existing configuration for what gets added to the body of the progress note
2. The Interaction and Request Notes grid is placed above Progress Note section [PENDING APPROVAL OF NEW AC IN 688762 - Now called "Comments" grid]
   1. Refresh Comments Grid and Apply Selected Comments buttons are at the bottom of the grid
   2. Displayed with all notes type
3. Create new options to "Save" and "Add Additional Signers" at the end of Progress Notes Section
4. Add Collapsible section to display all additional signers added to the request

# Summary

**Categories**

Function: Unassigned

Test Phase: Developer Test

# Formal Review

General Comments

**Manual Steps**

**Step 1**

**Execution Step**

Description\*

In the VCCM CRM application, log-in to the system as an FTP CCA/TAN/Pharmacy/PharmacyTech test user

Expected Results

The user is able to log-in as a FTP CCA/TAN/Pharmacy/PharmacyTech test user Comments

Validates

Attachments

**Step 2**

**Execution Step**

Description\*

Click on MVI Search from the USD ribbon

Expected Results

The user is directed to the MVI search page Comments

Validates

Attachments

**Step 3**

**Execution Step**

Description\*

Search for a Veteran (by traits or EDIPI)

Test Veteran Record: George VCCMAlberts 333624237, 10/18/1974 Expected Results

Veteran record is retrieved from MVI. Comments

Validates

Attachments

**Step 4**

**Execution Step**

Description\*

Click on the test facility for the Veteran record

Expected Results

An interaction is generated along with Veteran Info and Medical Charts tabs Comments

Validates

Attachments

**Step 5**

**Execution Step**

Description\*

User populates the required fields on the Interaction form and makes First Call Resolution = No and clicks Save

Expected Results

The request form is generated Comments

Validates

Attachments

**Step 6**

**Execution Step**

Description\*

On the Request form the user verifies there are horizontal tabs across the top of the Request form. There will be one button for each tab on the request form

Expected Results

Horizontal tabs are displayed correctly Comments

Validates

Attachments

**Step 7**

**Execution Step**

Description\*

User verifies the 'Progress Note' section contacts a Note Type field that allows the user to change the Progress Note to: Historcal, Workload (default view), and CRM Only

Expected Results

User is able to change the Note Type to Historical, Workload, or CRM Only Comments

Validates

Attachments

**Step 8**

**Execution Step**

Description\*

User verifies the following:

When you select Workload or Historical, the form is configured for that specific use. The buttons displayed associated with these Note Types are as follows:

* TEMPLATE (Used to generate the note text from template logic based upon data already entered on the request form)
* CANCEL (Used to Cancel and Delete all data entered in the Progress Note area, and set the form up for entering a new note)
* SIGNERS (Used to associate additional signers with the note or view those that have been associated previously)
* SAVE TO VISTA (Used to send the note created to VISTA via the existing progress note entity logic. This will automatically start the integration process to VISTA/CPRS. The progress note data entered on the Request form will be cleared and the Request reset for the creation of another note if needed.)

NOTE 1: When working with a workload encounter that always require some additional attributes, you will notice that certain attributes will be marked as required. These fields are only marked as required when there is note text entered. This is implemented this way so that the Request form can be saved without completing those required attributes when the note text has not been entered yet.

NOTE 2: After saving a Workload/Historical Note to Vista they will be displayed in the 'Progress Notes' grid on the Request form. They user can double click any row in the grid and it will take the user to the Progress Notes form (tab). If it was saved to Vista successfully the status will be marked as completed and the progress note will be read only

Expected Results

Request form functions correctly based on the user selecting Workload or Historical Comments

Validates

Attachments

**Step 9**

**Execution Step**

Description\*

User verifies the following:

When you select CRM Only, the form is configured for that specific use. The buttons displayed associated with that Note Type are as follows:

* TEMPLATE (same as described above)
* CANCEL (same as described above)
* SAVE TO CRM (Used to save the note to CRM. Upon successful creation of the CRM Note, the progress note data entered on the Request form will be cleared and the Request reset for the creation of another note if needed.)

NOTE: The 'Comments' grid will display the new CRM Note added Expected Results

CRM Only functionality works correctly Comments

Validates

Attachments

**Associated E-Signatures**

**Signed Action Signer Comment Additional Information**