[**180970: VCCM\_6\_S#677592\_Workload Encounter Note: Associate the**](https://clm.rational.oit.va.gov/qm/service/com.ibm.rqm.integration.service.IIntegrationService/resources/FtP%2B%28QM%29/executionscript/VCCM_6_S677592_Workload_Encounter_Note%3A__Associate_the_Progress_Note_to_an_Existing_Visit)[**Progress Note to an Existing Visit**](https://clm.rational.oit.va.gov/qm/service/com.ibm.rqm.integration.service.IIntegrationService/resources/FtP%2B%28QM%29/executionscript/VCCM_6_S677592_Workload_Encounter_Note%3A__Associate_the_Progress_Note_to_an_Existing_Visit)



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Originator: Pribyl, Brent (BAH) Owner:

Type: Manual

Test Data: Unassigned

Description: As a PACT/RN/LPN user, I need the ability to associate an existing visit to a workload progress note in order to create the appropriate encounter in PCE.

1. All users will have ability to create a new visit when writing a workload encounter by either leaving Visit Date blank or setting Visit Date to a Date/Time in the past (existing functionality)
2. PACT users will see list of existing appointment/visits on Progress Note Section of Request from. Hospital Admissions will not show.
   1. User can select existing appointment to associate Workload Encounter to existing appointment/visit
   2. On select of existing appointment/visit, Visit Date and Selected Hospital Location will be populated from selected appointment/visit.

Note: Per previous discussions, Pharmacy and TAN users will always be creating a new visit. Per existing functionality, Pharmacy and TAN users could still associate a PN to an existing visit by navigating to the Appointments Medical Chart, seeing the visit date/time and location of the existing appointment/visit, and setting these values on the Request form.

# 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 PACT test user

Expected Results

The user is able to log-in as a FTP PACT 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: Fred VCCMDinkleberry 333524227, 5/30/1971 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 Request form the user expands the 'New Progress Note' section and clicks on the 'Visit' dropdown field and verifies that that a list of existing appointments/visits are displayed

Expected Results

Existing Appointments/Visits are listed in the 'Visits' dropdown field Comments

Validates

Attachments

**Step 7**

**Execution Step**

Description\*

User selects an existing appointment/visit from the dropdown list and verifies that the 'Selected Location' (Hospital Location) field becomes populated

Expected Results

Selected Location (Hospital Location) becomes populated automatically based on the appointment/visit that is selected Comments

Validates

Attachments

**Step 8**

**Execution Step**

Description\*

User logs out and logs back in as FTP TAN/Pharmacy/PharmacyTech/CCA and verifies that they are not able to see the Visit label or the Visit dropdown on the Request form

Expected Results

Visit label and dropdown do not display on the request form for all other roles Comments

Validates

Attachments

**Step 9**

**Execution Step**

Description\* Expected Results Comments

Validates

Attachments

**Step 10**

**Execution Step**

Description\* Expected Results Comments Validates

Attachments

**Step 11**

**Execution Step**

Description\* Expected Results Comments Validates

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**Step 12**

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**Step 98**

**Execution Step**

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Attachments

**Associated E-Signatures**

**Signed Action Signer Comment Additional Information**