CDM CONSUMER DIRECTION MODULE

2010 Enhancements Testing Guide

We recommend that you run through the following test procedures on your test server. We have tested the new enhancements on three test sites with numerous different configurations, and conducting these tests will further ensure that no new bugs appear in your specific configuration and will prevent any issues from affecting your users.

If possible, we recommend that you copy your live CDM application and database into your test environment, then install the new enhancements according to the instructions sent with the installation files, and then execute these tests. That way, your test environment will most closely resemble your live application.

Please send any questions or report any bugs to cdm@bc.edu.

Review new settings

Spending plan columns – online column width

There is a new column in the spending plan column headings table titled "Online Column Width". This setting determines the width of each field as it appears in the online spending plan and expenditure report.

Pathway: **Admin** > **Financial** tab > **Spending Plan Column Headings** sub-tab

Employee user role

Review the following settings for the new employee user role:

- General Permissions: **Admin** > **Roles & Permissions** tab > **Permissions** sub-tab
- Communications: **Admin** > **Roles & Permissions** tab > **Edit Role Communications** sub-tab
- Home Page Dashboard: **Admin** > **Roles & Permissions** tab > **Home Page Dashboards** sub-tab
- Field Level Permissions: **Admin** > **Field Configuration** tab > **Edit Field Permissions** sub-tab

Participant Form Permission

The participant form can contain sensitive information, so be sure that only high level users can access this module.

Pathway: **Admin** > **Roles & Permissions** tab > **Permissions** sub-tab > Participant Form module is at the bottom of the table.

Participant Form Editing and Updating

From here, you can view the current blank participant form or update it to reflect any changes in settings. After changing any CDM field names, changing which fields are required, or modifying any dropdown menus, click **Create Default Blank Form** to update the form template so that all fields in the spreadsheet are the same as the fields in the CDM.

Participant Summary Homepage Table

This setting will determine whether this new table is shown on participant homepages.

Pathway: **Admin** > **Roles & Permissions** tab > **Home Page Dashboards** sub-tab

Medical Provider Specialties

Edit specialties or add new options to this dropdown menu.

Pathway: **Admin** > **Field Configuration** tab > **Dropdown Lists** sub-tab > **Medical Specialty** dropdown list

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Testing Checklist

More detailed instructions for these procedures can be found in the "2010 Enhancements Summary" document.

- ☐ Create and submit a new spending plan for a participant using the spreadsheet method, and another spending plan for a different user using the online method. Verify that the appropriate notifications are triggered in both cases.
- ☐ Approve one of the spending plans created in the previous step and deny the other. Verify that the appropriate notifications are triggered.
- ☐ Edit an existing spending plan using the online method.
- ☐ Enter participant expenditures using the spreadsheet method.
- ☐ Enter participant expenditures using the online method.
- ☐ Use the online method to edit expenditures that were already submitted.
- ☐ Create and export an ad hoc query
- ☐ **Print** link – View a participant's spending plan and expand the "details" of each section. Click on "print". If necessary, expand the details again. Print the page, and make sure that everything is displayed well.
- ☐ Add a comment to an existing spending plan (hint: find the comment associated with the spending plan within the **Notes** section of the participant file).
- ☐ Enter a new medical provider specialty, such as "Podiatry".
- ☐ If participants use the CDM in your state, add the new table to their homepage and login as a participant to make sure it displays information accurately.
- ☐ Print the list of settings in the **Admin** > **Application Settings** tab > **State Customization** sub-tab.
- ☐ Create login credentials for an existing employee. Login as the participant that is the employer of that employee and create an employee schedule. Login as that employee to make sure the schedule shows up.
- ☐ Create an audit log report and export it.

- Rhode Island only – Create a new assessment. Make sure that the comments carry over. Make some changes and click “save” (do not submit it yet). Log out, then log back in and make sure that the new assessment changes were kept. Click “submit” and make sure that the correct notifications are triggered. Login as admin and approve the budget generated by that assessment.

- Make sure your current forms and reports open and that the reports are displaying the data and the navigation icons at the top of the screen.