

## F513 – Visit Management

---

### F513\_US6582\_ Visit Management

Test Title: Visit Management

Description: This covers the functionality of editing and saving an encounter/visit location (e.g. Clinic Appointment, Hospital Admission, or New Visit)

Pre-Condition(s): User must have access to UI-components. User must have CPRS account with eHMP write up role.

Post-Condition(s): N/A

Step Title	Description	Expected Results	Data
1. Access the Visit Management Modal	After logging in to eHMP and selecting/confirming a patient, select the Visit Management section of the Patient Care Information component in the current workspace.	A modal is displayed with the heading, "Location for Current Activities".	
2. Visit Management Modal Content	Verify that the following items are contained within the modal: <ul style="list-style-type: none"><li>▪ "Encounter Provider" field</li><li>▪ "Clinic Appointments" tab</li><li>▪ "Hospital Admissions" tab</li><li>▪ "New Visit" tab</li><li>▪ "Encounter Provider" field (read-only)</li><li>▪ "Encounter Location" field (read-only)</li><li>▪ "Cancel" button</li><li>▪ "Confirm" button</li></ul>	All items appear in the modal.	
3. Search for Encounter Provider	Search for a provider by typing into the "Encounter Provider" field.  (NOTE: It is type ahead component.)	While typing into the field, the dropdown search results are narrowed to match the search criteria.	Vehu, Twelve

4. Select Encounter Provider	Select a provider from the search dropdown.	The Encounter Provider is selected and displayed in the current field as well as the read-only “Encounter Provider” field, located at the top right of the form.	
5. Default Encounter Location – Clinic Appointments	Verify that the “Clinic Appointments” tab is selected by default.	<p>The “Clinic Appointments” tab is selected by default. The following items are displayed:</p> <ul style="list-style-type: none"> <li>▪ “From” date field</li> <li>▪ “Through” date field</li> <li>▪ Clinic Appointments table <ul style="list-style-type: none"> <li>○ “Date” column and data</li> <li>○ “Details” column and data</li> <li>○ “Location” column and data</li> </ul> </li> </ul>	
6. From Field	<p>Select the “From” field, and choose a date from the calendar popup or by typing a date into the field.</p> <p>(NOTE: Ensure the format is MM/DD/YYYY.)</p>	The date is populated into the “From” field, and the list of clinic appointments is updated to match the date filter.	
7. Through Field	<p>Select the “Through” field, and choose a date from the calendar popup or by typing a date into the field.</p> <p>(NOTE: Ensure the format is MM/DD/YYYY.)</p>	The date is populated into the “Through” field, and the list of clinic appointments is updated to match the date filter.	
8. Select a Clinic Appointment	<p>Select a clinic appointment in the table.</p> <p>(NOTE: Multiple selection is not allowed.)</p>	The desired clinic appointment is selected and displayed in the read-only “Encounter Location” field, located at the top right of the form.	

9. View Encounter	Select the “View Encounter” button, located at the top right of the form.	The Encounter form associated with the Encounter Visit opens in a modal.  (NOTE: The Encounter Form is covered in another feature.)	
10. Close Encounter Form	Close the Encounter Form modal.	The user is returned to the Encounter Location form.	
11. Cancel Button	Select the “Cancel” button.	The Encounter Location form closes and the “Encounter Location” is not saved.	
12. Access the Visit Management Modal	Repeat steps 1-5.	All expected results are confirmed.	
13. Access Hospital Admissions Tab	Select the “Hospital Admissions” tab.	The “Hospital Admissions” tab is selected, and the following items are displayed: <ul style="list-style-type: none"> <li>▪ Hospital Admissions table <ul style="list-style-type: none"> <li>○ “Date” column and data</li> <li>○ “Details” column and data</li> <li>○ “Location” column and data</li> </ul> </li> </ul>	
14. Select a Hospital Admission	Select the appropriate hospital admissions row.  (NOTE: Multiple selection is not allowed.)	The desired hospital admission is selected and displayed in the read-only “Encounter Location” field, located at the top right of the form.	
15. Access New Visit Tab	Select the “New Visit” tab.	The “New Visit” tab is selected, and the following items are displayed:	

		<ul style="list-style-type: none"> <li>▪ “Visit Location” field</li> <li>▪ “Date of Visit” field</li> <li>▪ “Time of Visit” field</li> <li>▪ “Historical Visit” checkbox and content</li> </ul>	
16. Search for Visit Location	<p>Search for a Visit Location title by typing into the “Visit Location” field.</p> <p>(NOTE: It is type ahead component.)</p>	While typing into the field, the dropdown search results are narrowed to match the search criteria.	
17. Select Visit Location	Select the appropriate encounter location from the dropdown option.	The selected option is displayed in the read-only “Encounter Location” field, located at the top right of the form (read-only).	
18. Select Date and Time of Visit	<p>In the “Date of Visit” and “Time of Visit” fields, select a date and time by using the calendar popup and clock popup or by typing into the appropriate fields.</p> <p>(NOTE: Ensure the date format is MM/DD/YYYY and the time format is HH:MM)</p>	The desired date and time is populated in the appropriate fields.	
19. Select Historical Visit Checkbox	If the visit is a historical visit, select the Historical Visit checkbox.	The Historical Visit checkbox is selected.	
20. Select the Confirm Button	Select the “Confirm” button.	The modal disappears, and the selected encounter location is saved and displayed in the Visit Information section of the Patient Care Information component.	