

Health Management System

TEST PLAN

TN Medical

October 15, 2014

SPECTRUMITS (PVT) LTD

Unit 10, KENMARK CRESCENT, BLUFFHILL INDUSTRIAL PARK FABER ROAD, BLUFHILL, HARARE

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Module | Link (Active/Inactive) | Type Of Data Testing | Status | Comments |
| Login Page |  |  |  |  |
|  |  | Check Incorrect Password Entry | ??? | **-Clive said this is for administrator** |
|  |  | Check Password Failure Count | ??? | -**Clive said this is for administrator** |
|  |  | Check Password Expiry | ??? | -**Clive said this is for administrator** |
| Membership |  |  |  |  |
| * Members |  |  |  |  |
| 1. Add Member |  | Add Member | ok |  |
|  | inactive | Edit Member Details | ok | Cannot edit details for inactive member |
|  |  | Check Duplicate ID |  |  |
|  |  | Check Duplicate Passport Number |  |  |
|  |  | Valid Date Of Birth(Should not allow a date that is after creation date of the member) | ok |  |
|  |  | Auto Search for Company | No change | Normal |
|  |  | Auto Search for Family Doctor |  |  |
|  |  | Add dependant |  | You cannot add dependant while the status for the member is awaiting approval. See screen shot for some of the details required.  **-we can now add dependant while the status is awaiting approval and the other details that were required are no longer necessary.** |
|  |  | Check date of joining for dependant that it is not earlier than principal member joining date | ok |  |
|  |  | Check Validation Of Member Account Number on Banking Details | ??? |  |
| 1. Search Member |  | Search Member By Member No | ok |  |
|  |  | Search By First Name | ok |  |
|  |  | Search By Surname | ok |  |
|  |  | Search By Company | ok |  |
|  |  | Search By status | ok |  |
|  |  | Search By a Combination of Search Fields | ok |  |
| 1. Member Approval Manager |  |  | ??? | -**going to give rights when the upgrade is live** |
| d. Left Member Panel |  |  |  |  |
| * Member Actions |  |  |  |  |
|  |  | Delete | ok |  |
|  |  | Save Details |  | Automatically goes to agent search and we don’t understand what this is -need training  -**we were trained that we are not supposed to use the save under member actions** |
|  |  | Add Dependant |  | Cannot add dependant when member status is still on awaiting approval-we need a position whereby we approve once after adding all the dependants  -**can now add** |
|  |  | Add Member to Company | ok |  |
|  |  | Change Principal Member |  | Need training  **-trained** |
|  |  | View dependants | ok |  |
|  |  | Change Fund |  | No option given to change fund  -**-trained** |
|  |  | Add Member Picture |  | Need training  **-trained** |
| 1. Benefits |  | UPDATE BENEFITS |  | Need training |
| * Communication |  |  |  |  |
|  |  | Email |  | Not able to send by email see screen shot  -**Clive said this is not working at the moment**. |
|  |  | Send SMS |  | Need training  -**Clive said this is not working at the moment**. |
|  |  | Send Fax |  | Need training  -**Clive said this is not working at the moment**. |
| * Claims |  |  |  |  |
|  |  | Add Claim |  |  |
|  |  | Member Claims |  |  |
| * Accounts |  |  |  |  |
|  |  | View Statement |  |  |
|  |  | Adjustments |  |  |
|  |  |  |  |  |
|  |  | Capture Member Receipt |  |  |
| * Subscriptions |  |  |  |  |
|  |  | Invoice Member |  | Billing history is not showing correct figures  -**now ok** |
|  |  | Manage Subscriptions |  | Not billing all the members  -**now ok** |
| * Benefits and Waiting Periods |  |  |  |  |
|  |  |  |  |  |
| e) MEMBER CONDITIONS |  | ADD CONDITION |  |  |
| 1. Member Changes |  | 1. Change Category / Cascading (Changing for dependants) |  |  |
|  |  | 1. Change Principal Member / Billing Group |  |  |
|  |  | 1. Change Company / Cascading (Changing for dependants) |  |  |
|  |  | 1. Change Fund |  |  |
|  |  | 1. Change Status (Post Dated and Current)/ Check date of resigning |  |  |
| * Companies |  |  |  |  |
| 1. Add Company |  | Add Company |  |  |
|  |  | Edit Company Details |  |  |
| 1. Search Company |  | Search Company |  |  |
| 1. Company Changes |  | 1. Change Fund |  |  |
| 1. Accounts |  | 1. View Statements |  |  |
|  |  | 1. Adjustments |  |  |
|  |  | 1. Capture Expenses |  |  |
| 1. Subscriptions |  | 1. Invoice Company | ok |  |
|  |  | 1. Manage Subscriptions |  |  |
|  |  | 1. Capture Receipts |  |  |
| 1. Communication |  | 1. E-mail |  |  |
|  |  | 1. Send SMS |  |  |
| 1. Member Actions |  | 1. Delete |  |  |
|  |  | 1. Save Details |  |  |
|  |  | 1. Change Status |  |  |
|  |  | 1. Add Member to Company |  |  |
|  |  | 1. Add Company Picture |  |  |
| * Providers |  |  |  |  |
| 1. Add Provider |  | Add Provider |  |  |
|  |  | Check Duplicate Provider Numbers |  |  |
|  |  | Add Banking Details |  |  |
|  |  | Check Duplicate Banking Details |  |  |
|  |  | Edit Provider Details |  |  |
| 1. Search Provider |  | Search Provider |  |  |
| * Lists Manager |  | 1. Add to CARDLISTING |  |  |
|  |  | 1. Remove from CARDLISTING |  |  |
|  |  | 1. Search CARDLISTING |  |  |
| * ReInsurer |  | 1. Add ReInsurer |  |  |
|  |  | 1. Search Reinsurer |  |  |
| * Agents |  | Add Agent |  |  |
|  |  | Search Agent |  |  |
| Claims |  |  |  |  |
| * Add Claim |  | Add a claim |  |  |
|  |  | Search for Member and Provider |  |  |
|  |  | Check Foreign / Local Claim |  |  |
|  |  | Search for Tariff Code |  |  |
|  |  | Validation |  |  |
|  |  | Processing Claim |  |  |
|  |  | Check For Duplicate Claims |  |  |
| * Approve Claims |  | Searching and approving claim |  |  |
| * Claims Queuing |  | Searching and queuing claim |  |  |
| * Search claims |  | Search claim By Claim No |  |  |
| * Batch search |  | Search for claim batches |  |  |
| * Payments |  |  |  |  |
| 1. Settle Claims |  | Claim Payments |  |  |
| 1. History |  | View Claim Payments History |  |  |
| * Reports |  | Reports |  |  |
| * Claim Authorisation |  | Claim Authorisation |  |  |
| * Pre Authorisation |  |  |  |  |
|  |  | Add Preauthorisation |  |  |
|  |  | Set Validation Rule |  |  |
| Quotations |  |  |  |  |
| * Create Quotations |  |  |  |  |
| * Search Quotations |  |  |  |  |
| Commissions |  |  |  |  |
| * Manage Commission Schemes |  | Add Commission Scheme |  |  |
| * Manage Commission Schedules |  | Manage Commissions |  |  |
| * Manage Commission Runs |  | View Commission Runs |  |  |
| Excel Proforma Invoice |  |  |  |  |
| Subscriptions |  |  |  |  |
| * Billing History |  | View Billing History |  |  |
| * Manage Subscriptions |  | Add/Update Subscription Rates |  |  |
| * Bulk Billing |  | Bill by fund, billing group or subscription |  |  |
| * Manage subscriptions Rates |  | Add/Update Subscription Rates |  |  |
| * Manage Subscription Schemes |  | Add Subscription Schemes |  |  |
| Receipts |  |  |  |  |
| * Receipting History | active | View Receipting History |  |  |
| Communications |  |  |  |  |
| * Email Distribution | inactive |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Reports |  |  |  |  |
| * All Reports |  | View Reports |  |  |
|  |  | Searching using Filters |  |  |
| * Statistical Reports |  | View Statistical Reports |  |  |
| * Exception Reports |  | View Exception Reports |  |  |
| * Adhoc Reporting |  | Create, Update and View Custom Reports |  |  |
| * Adhoc Reporting List |  | Create, Update and View Custom Reports |  |  |

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| Module | Link (Active/Inactive) | Type Of Data Testing | Status | Comments |
| Administration |  |  |  |  |
| * Fund Administration |  |  |  |  |
| 1. Manage Funds |  | Add/Update Fund Details |  |  |
| 1. Manage Packages and schemes |  | Add/Update category and subscription schemes |  |  |
| 1. Manage Member Accounts |  | Create Member Accounts for members that have been imported into the system from an external source. |  |  |
| 1. Member Type Accounts |  | Assign the accounts which should be applicable to the Selected Member Type. |  |  |
| 1. Manage Age Bands |  |  |  |  |
| 1. Manage Group Sizes |  |  |  |  |
| * Benefits Administration |  |  |  |  |
| 1. Manage Mapping Schemes |  | Add/Update Tariff Mapping Schemes |  |  |
| 1. Manage Benefit Lists |  | Add/update benefits |  |  |
| 1. Manage Benefit Schemes |  | Add/Update Benefit Mapping Schemes |  |  |
| 1. Update Fund Member’s Benefits |  | Update member benefits by fund |  |  |
| 1. Pre Authorisation Benefits |  |  |  |  |
| * Tariffs Administration |  |  |  |  |
| 1. Add Tariffs |  | Add/Update Tariff Details |  |  |
| 1. Search Tariffs |  | Search Tariffs |  |  |
| 1. Tariffs Update |  |  |  |  |
| 1. Add Drugs |  | Add Drugs |  |  |
| 1. Search Drugs |  | Search Drugs |  |  |
| * System |  |  |  |  |
| 1. Manage Users |  | Add/Update User Details |  |  |
| 1. Manage Cache |  | Clear system cache for Main Menu structure, Categories, etc. |  |  |
| 1. Manage Parameters |  | Add/update HMS lookup lists |  |  |
| 1. Licencing and Registration Details |  | View Licence & Registration Details |  |  |
| 1. Deleted Members |  | View Deleted Members |  |  |
| * Security |  |  |  |  |
| 1. Menu Level Access |  | Assign Menu level permissions to specific users and/or user groups |  |  |
| 1. Command Level Access |  | Assign Command level permissions to specific users and/or user groups |  |  |
| 1. Report Permissions |  | Assign Report permissions to specific users |  |  |
| 1. Notification Permissions |  | Assign Notification permissions to specific users |  |  |
| * Audit |  |  |  |  |
| 1. Setup Table Audits |  | Configure audit trails |  |  |
| 1. View Logs |  | View audit trails by user, table, action and/or date |  |  |
| * Exception Reports |  |  |  |  |
| 1. Membership |  | View Membership Exception Reports |  |  |
| * Reports |  |  |  |  |
| Customize Reports | Not active | Customize report parameters |  |  |
| * Manage Transactions |  |  |  |  |
| * Reinsurance Administration |  |  |  |  |
| 1. Reinsurance Dashboard |  |  |  |  |
| 1. Manage Treaties |  |  |  |  |
| Accounts |  |  |  |  |
| * Upload Bank Statement |  |  |  |  |
| * Adjustment Approvals |  |  |  |  |
| * Bank Statement Import |  |  |  |  |
| * Bank Statement Adjustment |  |  |  |  |
| * Processed bank statements |  |  |  |  |

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| **CLIENT**: | NAME: |  |
|  | SIGNATURE: |  |
| **SPECTRUMITS:** | NAME: |  |
|  | SIGNATURE: |  |