Test scenarios for the "Add Person" page

Here are detailed test scenarios for the "Add Person" page:

Common Test Scenarios for All Panels (Add Person Page)

1. Verify successful submission when all required fields are filled with valid data and a confirmation message is displayed.
2. Verify validation messages appear when mandatory fields are left empty and submission is attempted.
3. Verify invalid email formats display appropriate validation messages.
4. Verify validation message appears when an invalid date is entered.

Invalid Date Input

Description	DOB	Reason
Future date	01/01/2026	Date of birth cannot be in future
Too young	2010-01-01	Person is below the minimum age limit
Invalid date (nonexistent)	2023-02-29	2023 is not a leap year
Incorrect format	15th May 1990	Date format is invalid
Letters in input	abcd-ef-gh	Non-numeric, invalid characters
Empty input	``	Required field is empty
Special characters in input	1990-@#-$$	Special characters not allowed
Overly old DOB	1800-01-01	Outside acceptable human lifespan

Valid Date Input

Description	DOB	Reason
Typical valid input	05/15/1990	Valid adult date of birth
Minimum allowed age (18+)	06/24/2007	Just turned 18 (assuming 2025-06-24)
Leap year DOB	02/29/2000	Valid leap year date
Oldest acceptable DOB (~120 yrs)	01/01/1905	Acceptable within human lifespan

5. Verify the system restricts input beyond the maximum character limit for any field.
6. Verify navigating to the "Add Person" page from various sections clears all fields and loads the default form.
7. Verify inputting script tags (e.g., `<script>$(window).load(function(){alert('hello');});</script>`.) is handled safely and displayed as plain text without execution.
8. Verify special characters (as123!@$#&^^(()_++:"+/kljjljk<>??><<MMM~!~!!#!$#!$%#@!$^@@%^^%) are accepted or handled appropriately in name and other fields without error.
9. Verify the "Add Person" page functions correctly and appears consistent across multiple browsers (Chrome, Firefox, Safari, Edge).

Test Scenarios for Add Person – Personal Details Section

1. Verify First Name is mandatory and shows validation if left blank on Save.
2. Verify First Name allows up to 64 characters and accepts special characters.
3. Verify MI (Middle Initial) allows only 1 character, including special characters.

4. Verify Last Name is mandatory and shows validation if left blank on Save.

5. Verify Last Name allows up to 64 characters and accepts special characters.

6. Verify Suffix allows up to 20 characters and accepts special characters.

7. Verify Preferred Name allows up to 64 characters and accepts special characters.

8. Verify Date of Birth allows selecting from a calendar and manual date entry.

9. Verify Date of Birth does not allow a future date and shows validation.

10. Verify Date of Birth does not allow a year less than 1900 and shows validation.

11. Verify Age auto-populates correctly after entering Date of Birth.

12. Verify Gender dropdown shows options Male, Female and is optional.

13. Verify Height field accepts ft between 0-9 and inches between 0-99.

14. Verify Height inches greater than 11 shows tooltip with valid range.

15. Verify Height shows info message when patient age is less than 18.

16. Verify Weight accepts values between 0 and 10,000 lbs.

17. Verify Weight greater than 999.9 lbs shows tooltip with valid range.

18. Verify Status radio buttons (Active/Inactive) are optional.

19. Verify Patient radio buttons (Yes/No) are optional.

20. Verify selecting Responsible Person as Self shows warning if age < 18.

21. Verify selecting Responsible Person as Other displays patient search.

22. Verify Responsible Person search displays results in proper format.

23. Verify dependent patient cannot be selected as Responsible Person.

24. Verify Signature on File checkbox allows selection and tooltip explains purpose.

25. Verify clicking Save without First Name or Last Name shows toaster message.

Test Scenarios for Duplicate Patient Identification

1. Verify duplicate profiles show when First Name and Last Name match existing records.

2. Verify duplicate profiles show when Date of Birth matches existing records.

3. Verify duplicate count displays at the top as "Possible Duplicate Profiles".

4. Verify duplicate records are displayed in specified format.

5. Verify duplicate records appear in blue text as per UX design.

6. Verify only 10 records are displayed at a time with a scroll bar if needed.

7. Verify accordion allows expanding or collapsing duplicate records section.

8. Verify duplicate records hyperlink opens Patient Overview in new tab.

9. Verify hyperlink is disabled if user lacks permission to view patient.

10. Verify updating or removing First Name / Last Name / DOB updates duplicate results.

11. Verify if no duplicates found, the duplicate section disappears.

12. Verify Save allows proceeding even when duplicates are shown.

13. Verify Cancel discards the record and duplicate lookup results.

Test Scenarios for Resetting Add Person Page

1. Verify all forms reset when navigating again to Add Person page.

2. Verify validators and invalid states are cleared on revisiting the page.

3. Verify multiple additions of new persons work without clearing cache.

4. Verify new person data saves correctly on every new entry after rerouting.

Test Scenarios for Add Person – Referral Section

1. Verify Referral Category dropdown contains options: External Provider, Patient, External Sources.

2. Verify fields dynamically change based on the Referral Category selected.

Referral Category: External Provider

1. Verify Referring From field is displayed only when External Provider is selected.

2. Verify Referring From field is mandatory when External Provider is selected.

3. Verify Referring From supports search functionality and displays Recent Selections at the top.

4. Verify validation error appears if Referring From is left blank and Save is clicked.

5. Verify clear (X) icon allows clearing the search input.

6. Verify selected provider displays Practice Name, Address, Email, Phone (blank if unavailable).

7. Verify Practice Name, Address, Email, and Phone pull correctly from Referral Affiliates.

Referral Category: Patient

1. Verify Patient Name field is displayed only when Patient is selected.

2. Verify Patient Name field is mandatory.

3. Verify validation error appears if Patient Name is left blank.

4. Verify Patient Name search works and displays matching results from existing patients.

5. Verify +Add New Patient option is available if no match is found.

6. Verify selecting an existing patient auto-populates Patient Name, Address, Email, Phone (blank if unavailable).

7. Verify Phone is displayed in the format (xxx)-xxx-xxxx.

8. Verify newly added external patients via this section are not added to the practice database or global search.

9. Verify First Name and Last Name are mandatory when adding a new external patient.

10. Verify Email validates proper email format for new external patients.

11. Verify Phone validates 10-digit format for new external patients.

12. Verify Email shows appropriate validation message for invalid format.

13. Verify Phone shows appropriate validation message for less than 10 digits.

14. Verify Add New Patient fields accept special characters where applicable.

Referral Category: External Sources

1. Verify Source Name field is displayed only when External Sources is selected.

2. Verify Source Name field is mandatory.

3. Verify validation error appears if Source Name is left blank.

4. Verify Source Name values pull from Referral Sources under Practice Settings > Patient Profile.

5. Verify +Add New Source option is available.

6. Verify Add New Source accepts characters, numbers, and special characters.

7. Verify system prevents saving duplicate Source Names.

8. Verify new Source Name is added correctly to Referral Sources under Practice Settings.

Notes Field

1. Verify Notes field accepts up to 2000 characters.

2. Verify Notes field allows special characters, numbers, and letters.

Test Scenarios for Add Person – Contact Details Section

1. Verify the Opt-out of all communications slide bar is set to Off by default.

2. Verify enabling Opt-out of all communications automatically checks all individual opt-out checkboxes and disables phone and email reminders.

3. Verify the 'Use Account Member's Address' dropdown becomes active only when Responsible Party is set to Other and a person is selected.

4. Verify changing the Responsible Party resets the 'Use Account Member's Address' dropdown to No Selection.

5. Verify selecting a Responsible Member auto-populates Street Address if available and makes the field non-editable.

6. Verify if the selected Responsible Member has no Street Address, the field remains blank and non-editable.

7. Verify when 'Use Account Member's Address' is set to No Selection, Street Address becomes editable and allows up to 128 characters.

8. Verify selecting a Responsible Member auto-populates Address 2 if available and makes it non-editable.

9. Verify when 'Use Account Member's Address' is set to No Selection, Address 2 becomes editable and allows up to 128 characters.

10. Verify selecting a Responsible Member auto-populates City if available and makes it non-editable.

11. Verify when 'Use Account Member's Address' is set to No Selection, City becomes editable and allows up to 64 characters.

12. Verify selecting a Responsible Member auto-populates State abbreviation and makes it non-editable.

13. Verify when 'Use Account Member's Address' is set to No Selection, State becomes selectable from a dropdown.

14. Verify selecting a Responsible Member auto-populates Zipcode and makes it non-editable.

15. Verify when 'Use Account Member's Address' is set to No Selection, Zipcode becomes editable.

Test Scenarios for Phone Section

1. Verify Opt-out of Phone Communication is automatically checked when Opt-out of All Communications is enabled.

2. Verify Opt-out of Phone Communication can be manually unchecked.

3. Verify a new phone row cannot be added until the first row is fully completed.

4. Verify multiple phone numbers can be added without a limit.

5. Verify the Phone Owner dropdown appears only when Responsible Party is set to Other.

6. Verify the Phone Owner dropdown displays Self and the selected Responsible Person.

7. Verify selecting Self allows manual phone number entry.

8. Verify phone numbers require exactly 10 digits and validate properly.

9. Verify phone numbers auto-format as (xxx) xxx-xxxx after entry.

10. Verify selecting Responsible Person auto-populates phone number as read-only.

11. Verify Phone Type dropdown provides options Mobile, Home, and Work.

12. Verify Phone Type is required; validation appears if not selected.

13. Verify Phone Type auto-fills and becomes non-editable when Responsible Person is selected.

14. Verify only one phone number can be marked as Primary at a time.

15. Verify if the Primary phone row is deleted, the next row automatically becomes Primary.

16. Verify Phone Reminder is checked by default unless opt-out options are selected.

17. Verify selecting Phone Reminder unchecks Opt-out of All Communications and Opt-out of Phone Communication.

18. Verify Text Reminder is automatically checked when Phone Type is Mobile.

19. Verify Text Reminder cannot be checked for Home or Work types and shows red icon.

20. Verify deleting a phone row clears data if it is the only row.

21. Verify the last phone row cannot be deleted but only cleared.

22. Verify changing Responsible Person to Self hides the Phone Owner column and allows edits to Phone Number and Phone Type.

23. Verify changing Responsible Person to Other updates the Phone Owner dropdown and pre-fills details.

24. Verify phone numbers and types can be saved successfully.

25. Verify validation error shows if no Primary phone is selected on Save.

Test Scenarios for Email Section

1. Verify Opt-out of Email Communication is unchecked by default.

2. Verify enabling Opt-out of All Communications automatically checks Opt-out of Email Communication.

3. Verify a new email row cannot be added unless the previous row is completed.

4. Verify multiple email addresses can be added without limit and without introducing scrollbars.

5. Verify the Email Owner dropdown appears only when Responsible Party is set to Other.

6. Verify the Email Owner dropdown displays Self and the selected Responsible Person.

7. Verify selecting Self allows manual email entry.

8. Verify email addresses must be entered in valid email@domain.com format; invalid entries show validation errors.

9. Verify selecting Responsible Person auto-populates email address as non-editable.

10. Verify only one email address can be selected as Primary.

11. Verify Email Reminder is checked by default unless opt-out options are selected.

12. Verify deleting an email row clears data if it is the only row.

13. Verify + icon adds additional email rows only after the first email is entered.

14. Verify changing Responsible Person updates Email Owner and Email Address fields correctly.

15. Verify changing Responsible Person to Self makes the email field editable.

16. Verify changing Responsible Person to Other retains previous Self email values.

17. Verify the last email row cannot be deleted but only cleared.

18. Verify manually checking or unchecking Email Reminder functions as expected.

19. Verify validation error shows if no Primary email is selected on Save.

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1. **Primary Location**

2. Verify the "Primary Location" dropdown displays a list of valid locations.

3. Verify only one location can be selected as the Primary Location.

4. Verify "Primary Location" is a mandatory field, saving without selecting it triggers a validation error.

5. Verify selected Primary Location updates the Preferred Dentist and Preferred Hygienist dropdowns accordingly.

6. **Alternate Locations**

7. Verify the "Alternate Location(s)" dropdown allows selecting multiple locations.

8. Verify all selected locations appear under the dropdown with a remove (cross) icon.

9. Verify clicking the cross icon removes the location from the selected list without any warning or confirmation.

10. Verify the Primary Location cannot be selected as an Alternate Location

11. **Preferred Dentist**

12. Verify the "Preferred Dentist" dropdown lists only Dentists associated with the selected Primary Location.

13. Verify only one Dentist can be selected at a time.

14. Verify changing the Primary Location updates the Preferred Dentist list accordingly.

15. Verify the field is empty/reset if no Dentists are associated with the selected location.

16. **Preferred Hygienist**

17. Verify the "Preferred Hygienist" dropdown lists only Hygienists associated with the selected Primary Location.

18. Verify only one Hygienist can be selected at a time.

19. Verify changing the Primary Location updates the Preferred Hygienist list accordingly.

20. Verify the field is empty/reset if no Hygienists are associated with the selected location.

21. **Master Flag**

22. Verify the Master Flag dropdown displays flags created in Practice Settings.

23. Verify the user can select multiple flags from the dropdown.

24. Verify selected flags are displayed under the field with a cross icon to remove them.

25. Verify removing a selected flag via the cross icon updates the list accordingly.

26. **Custom Flag**

27. Verify the user can enter custom flag text into the text field.

28. Verify clicking the "+" icon without entering text shows a validation error: "This field is required."

29. Verify the info message "Enter multiple custom flags simultaneously by using comma (,) to separate text" is displayed.

30. Verify entering multiple flags separated by commas and clicking "+" adds all flags to the list individually.

31. Verify all added custom flags are shown under the box with the cross icon for individual removal.

32. Verify removing a custom flag via the cross icon removes only that specific flag.

33. Verify added custom flags persist and are displayed as part of the list.

34. **End Date (for Custom Flag)**

35. Verify the "End Date" field allows date selection in mm/dd/yyyy format.

36. Verify the End Date field is optional — it does not trigger validation if left blank.

37. Verify the End Date appears associated with custom flags when entered.

38. **Discount**

39. Verify the Discount dropdown shows only discounts configured in Practice Settings.

40. Verify one discount can be selected from the dropdown.

41. Verify the selected discount is saved and reflected correctly upon form submission.

42. **Group**

43. Verify the Group dropdown allows multiple selections.

44. Verify all selected groups are displayed under the field with a cross icon for removal.

45. Verify removing a selected group updates the list accordingly.

10. Account Receives Statements?

37. Verify the "Account receives statements?" checkbox is checked by default.

38. Verify unchecking this box disables and unchecks the "Account receives finance charges?" checkbox.

11. Account Receives Finance Charges?

39. Verify this checkbox is checked by default if "Account receives statements?" is checked.

40. Verify the user can only interact with this checkbox if "Account receives statements?" is checked.

41. Verify if "Account receives statements?" is unchecked, this checkbox becomes greyed out and cannot be checked.

42. Verify re-checking "Account receives statements?" re-enables the finance charges checkbox with previous state retained (if applicable).

Test Scenarios for Dental Records Section

1. **Previous Dentist**

2. Verify that the "Previous Dentist" field accepts up to 64 characters.

3. Verify that entering more than 64 characters is restricted or truncated.

4. Verify that the field accepts alphanumeric and common special characters (e.g., hyphens, apostrophes).

5. Verify that the field is optional and does not show validation if left blank.

6. **Phone Number**

7. Verify that the "Phone Number" field accepts only numeric input.

8. Verify that entering fewer than 10 digits triggers validation:
   "phone number requires full 10 digit number".

9. Verify that entering exactly 10 digits is accepted.

10. Verify that entering more than 10 digits is restricted or truncated based on implementation.

11. Verify that pasting a numeric string with fewer than 10 digits triggers validation.

12. Verify that non-numeric characters are either ignored or rejected.

13. **Email**

14. Verify that the "Email" field accepts text in a valid email format (e.g., **user@domain.com**).

15. Verify that an invalid format shows validation:
   "email requires a valid email format".

16. Verify that the field is optional and no validation appears if left blank.

17. Verify that pasting a valid email passes validation.

18. **Street Address**

19. Verify that the "Street Address" field accepts up to 128 characters.

20. Verify that entering more than 128 characters is restricted or truncated.

21. Verify that the field accepts letters, numbers, spaces, and special characters (e.g., #, /, ,).

22. Verify that the field is optional.

23. **Address Line 2**

24. Verify that the "Address Line 2" field accepts up to 128 characters.

25. Verify that input beyond 128 characters is restricted or truncated.

26. Verify that this field is optional.

27. **City**

28. Verify that the "City" field accepts up to 64 characters.

29. Verify that input beyond 64 characters is restricted or truncated.

30. Verify that alphabetic characters, spaces, and hyphens are supported.

31. Verify that the field is optional.

32. **State**

33. Verify that the "State" dropdown displays the full names of all U.S. states (e.g., California, Texas).

34. Verify that only one state can be selected at a time.

35. Verify that upon saving, the selected state is stored and displayed using its 2-letter abbreviation (e.g., CA, TX).

36. Verify that changing the state updates the stored abbreviation.

37. Verify that the field is optional.

38. **Zip Code**

39. Verify that the "Zip Code" field accepts only numeric characters.

40. Verify that entering fewer than 5 digits triggers validation:
    "zip code must be 5 to 9 numeric characters".

41. Verify that entering exactly 5 or 9 digits is accepted.

42. Verify that entering more than 9 digits is restricted, no further input is allowed.

43. Verify that pasting a numeric string with more than 9 digits only retains the first 9 digits.

44. Verify that pasting fewer than 5 digits triggers validation.

45. Verify that non-numeric characters are not accepted in the field.

46. **Notes**

38. Verify that the "Notes" field accepts up to 500 characters.

39. Verify that entering more than 500 characters is not allowed, extra characters are ignored or blocked.

40. Verify that a character counter is displayed while typing in the Notes field.

41. Verify that the character counter correctly updates in real time as each character is typed or deleted.

42. Verify that when 500 characters are entered, the counter reflects "500 / 500".

43. Verify that when pasting content exceeding 500 characters, only the first 500 characters are accepted and the counter reflects 500.

44. Verify that line breaks (\n) and special characters (e.g., &, %, #) count toward the 500-character limit.

45. Verify that the Notes field can be left blank and the character count shows 0 / 500

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1. **Field Display**
2. Verify the Additional Identifier field is displayed on the form.
3. Verify the field type depends on the Practice Settings configuration:

Free text input if set to Free Form Text.

Dropdown list if set to Specified List.

2. **Free Form Text**
3. Verify the field appears as a free text input when configured as Free Form Text.
4. Verify the field accepts up to 100 characters.
5. Verify that entering more than 100 characters is restricted or truncated.
6. Verify the field accepts letters, numbers, and common special characters (e.g., -, _, /, #).
7. Verify that the entered free text value is saved and displayed correctly after saving and reloading.
8. **Specified List**
9. Verify the field appears as a dropdown list when configured as Specified List.
10. Verify the dropdown contains only values defined in Practice Settings.
11. Verify selecting a value from the dropdown saves and displays the correct selection after saving and reloading.
12. **No Additional Identifiers Available**
13. Verify that when no additional identifiers exist or are defined, the message **"No records available"** is shown in place of the input field.
14. Verify no input field (text or dropdown) is shown when the message is displayed.

Verify that once identifiers are created or defined, the message disappears and the appropriate input field is shown.

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1. Verify that the Account Members section displays data only when:

Responsible Person is set to "Other", and

A person is selected by searching and choosing a name in the Responsible Person field.

2. Verify that if "Other" is selected but no person is chosen from the search, the section shows no data and remains empty.
3. Verify the Account Members section updates dynamically when the Responsible Person is changed in the Personal Details section.
4. Verify that if the selected Responsible Person has no related/dependent members, only that person's details are shown.
5. Verify that for each related member, the Account Member column shows Last Name and First Name.
6. Verify the Responsible Person is indicated with "RP" next to their name.
7. Verify the Date of Birth is displayed in mm/dd/yyyy format for each member.
8. Verify the Age is displayed in years for each member.

9. Verify that Date of Birth and Age are not hyperlinks.
10. Verify that when Responsible Person is changed to Self, the Account Members section displays a blank table with the message: "No records available".
11. Verify that the Account Member name is a clickable hyperlink.
12. Verify that clicking the Account Member name opens the patient overview page for that member.

Verify that Date of Birth and Age fields are not clickable or linked.

Test Scenarios for Documents Section

1. Verify the section header is titled "Documents".
2. Verify that the "Print New Patient Forms" button is present but non-functional.
3. Verify that when adding a new patient, the Documents section is empty and shows the message: *"No content available"*.
4. Verify that no document rows are displayed for a new patient until documents are uploaded after saving.
5. Verify that the section includes the following columns once documents are added:

   Name

   Group

   Type

   Date

   Action

Test Scenarios for Insurance Section

1. **Adding Policies**

- Verify a patient can have up to 6 insurance policies.
- Verify the **+ Policy 1** button allows adding additional policies until the max limit (6).
- Verify the trash icon deletes the corresponding policy.
- Verify removing a benefit plan from Responsible Person also removes it from spouse/dependent accounts.

2. **Policy Holder Dropdown and Selection**

- Verify the **Policy Holder** dropdown contains options:
  - Select Policy Holder (default)
  - Self
  - Responsible Person (if selected in Personal Details)
  - Other (allows selecting persons other than Self or Responsible Person)
- Verify that selecting "Self" as Policy Holder shows the Plan Name search field.
- Verify selecting "Responsible Person" as Policy Holder shows the responsible person's name, and if there are dependents, shows their names too.

- Verify selecting "Other" shows a field to search and select another person.

3. **Policy Holder = Self: Adding and Editing Plans**

- Verify typing in the Plan Name search field shows plans matching typed characters.
- Verify search results display Benefit Plan Name, Carrier Name, Carrier Address, and Group #.
- Verify after selecting a plan, the Plan Name is displayed with a "Change" hyperlink.
- Verify clicking "Change" removes the selected plan and allows selecting a new plan.
- Verify fields for Policy Holder Id and Member Id accept up to 20 alphanumeric/special characters and are optional.
- Verify Effective Date defaults to today's date, is editable, and displayed in mm/dd/yyyy format.
- Verify Priority dropdown defaults to the order policies are added and allows reordering.
- Verify server error is shown when duplicate priority values are saved.
- Verify plans already added show a message in the dropdown: "this plan may not be selected because it is already attached."

4. **Policy Holder = Responsible Person: Adding New Plan**

- Verify that selecting Responsible Person as Policy Holder displays their name and dependents.
- Verify if Responsible Person has no plans, a modal opens to add a new plan.
- Verify modal contains:
  - Select Policy Holder (Self or Other)
  - Search and select Plan Name
  - Policy Holder Id (optional)
  - Member Id (optional)
  - Effective Date (default today's date, editable)
- Verify after modal submission, data is displayed correctly in the main form.
- Verify header of the Add Policy popup shows the correct priority (e.g., Primary Dental Benefit Plan).
- Verify that if user cancels on secondary or supplemental plan popup, the link to select plan remains accessible.
- Verify plan fields are filled with modal input data once plan is selected.
- Verify Policy Holder Id field shows data if present but disables editing with tooltip: "Policy Holder id can be edited only from Policy Holder".
- Verify Member Id is editable.
- Verify Relationship to Policy Holder dropdown appears (Dependent, Spouse, Other) when Policy Holder is Responsible Person or Other, and is mandatory.
- Verify duplicate priority selections cause server error.
- Verify the trash icon deletes the corresponding policy.

5. **Policy Holder = Responsible Person: Selecting Existing Plan**

- Verify modal displays existing plans if Responsible Person has them.
- Verify each plan displays Benefit Plan Name, Carrier Name, Carrier Address, Group #.

- Verify plans already attached cannot be selected (radio disabled) and show a tooltip "this plan may not be selected because it is already attached."
- Verify Continue button activates only after selecting a valid plan.
- Verify Cancel button closes modal without errors or warnings.
- Verify selecting a plan updates the main form with correct data.
- Verify changing Responsible Person triggers the existing plan selection modal again for new policy holder.
- Verify if Responsible Person has no plans, no modal appears; instead, plan name search field shows.

6. **Policy Holder = Other: Adding New Plan**

- Verify selecting Other allows searching for persons other than Self or Responsible Person.
- Verify you can select Responsible Person here as well.
- Verify modal appears to add new plan if the selected person has no plans.
- Verify modal fields and behavior match Responsible Person new plan modal.
- Verify priority headers reflect correct priority order.
- Verify the trash icon deletes the corresponding policy.
- Verify removing plans cascades delete to spouse/dependent accounts.
- Verify updated member id or policy holder info only reflects after patient save.

7. **Policy Holder = Other: Selecting Existing Plan**

- Verify modal appears listing existing plans of selected other person.
- Verify tooltip appears for plans already used.
- Verify Save & Continue enables only after selecting plan.
- Verify Cancel closes modal without warnings.
- Verify selecting plan updates main form.
- Verify policy holder ID and member ID fields behave as described.
- Verify Relationship to Policy Holder dropdown appears and is mandatory.
- Verify Priority dropdown and duplicate priority validation work.
- Verify deleting policies updates form correctly.
- Verify removal of benefit plan deletes from related spouse/dependent accounts.