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**Unit Test Case: CCO eCoaching Log – New Submission**

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| Prepared by: | Lili Huang |  | Date: | 4/23/2018 |
| Department / Location: | Coralville |  |  |  |
| Approved by: |  |  | Date: |  |

**Change History Log**

| **Date** | **Change Description** | **Author** |
| --- | --- | --- |
| 04/23/2018 | Initial revision. | Lili Huang |
| 07/30/2018 | TFS 11602 – More explicit message is needed when sub-coaching reason is not selected | Lili Huang |
| 08/21/2018 | TFS 11792 – Submit page ‘locks up’ if have error and select cancel/stay on this page  Added NS-16, NS-17. | Lili Huang |
| 08/31/2018 | TFS 11983 – Include a link to ecl sharepoint site to report issues | Lili Huang |
| 09/04/2018 | TFS 11983 – Include a link to ecl sharepoint site to report issues  Removed NS-18 and NS-19;  Added to Common UTC | Lili Huang |
| 03/08/2019 | TFS 13717 – Add Dual as a Program and change Module label | Lili Huang |
| 03/13/2019 | TFS 13809 – New Submission: Changing Program resets Direct/Indirect radio btn; | Lili Huang |
| 09/11/2019 | TFS 14679 – Follow up Process | Lili Huang |
| 07/24/2020 | TFS 17803 – GDIT to MAXIMUS | Lili Huang |
| 08/27/2020 | TFS 18321 – Work At Home (Return to Site Only) | Lili Huang |
| 10/12/2021 | TFS 23137 – Quality – new coaching reason pfd and pfd date | Lili Huang |
| 11/09/2021 | TFS 23489 - update email process in user interface | Lili Huang |
| 06/08/2022 | TFS 24733 – Team coaching log submission | Lili Huang |
| 04/11/2023 | TFS 26419 – New Coaching Reason: Claims View (Medicare Only)  Added NS-2-4, NS-2-4-1, NS-2-4-2. | Lili Huang |
| 12/04/2023 | TFS 27483 - WAH coaching6reason text change, subcoaching reason update; Add WFH (Return to Site) for Quality module.  Updated “Work At Home” to “Work From Home”. | Lili Huang |
| 02/16/2024 | TFS 27694 – Subcontractor  *Added*  *Subcontractor Coaching Log Submission section*  *Subcontractor Warning Log Submission section* | Lili Huang |
| 05/06/2024 | TFS 28208 – Add ISG; Mass submission for Supervisor and Quality modules.  *Added*  *ISG Individual Submission*  *ISG Mass/Team Submission*  *Quality Individual Submission*  *Quality Mass/Team Submission*  *Supervisor Individual Submisson*  *Supervisor Mass/Team Submission.*  *Updated*  *CSR Individual Submission*  *CSR Mass/Team Submission*  TFS 28134 – No Warning Logs for Subcontractors.  *Updated*  *Subcontractor Warning Log Submission* | Lili Huang |
| 07/26/2024 | 28467 – ASR  Added ASR Coaching Log Submission section.  28489 – Add Production Planning  Added Production Planning section.  Cleanup | Lili Huang |

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| 1. PROJECT NAME: | eCoaching Log (eCL) |
| 2. UNIT IDENTIFIER: | User Interface – New Submission |

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| **Test Case ID** | **Test Data Setup** | **Action** | **Expected Result** | **Pass/Fail** |
| NS-1 | User is configured with one of the following role:  (table UI\_User\_Role)  **ARC**  **Supervisor**  **Manager**  **Manager**  **Director**  **Employee**  **Restricted** | Launch eCoaching Log Web application.  Click New Submission in the menu bar. | New submission page displays with **Employee Level** dropdown only. | P |
| **NS-2** | | | | |
| **CSR** module – Individual Submission | | | | |
| NS-CSR-I1 | User is configured with one of the following job codes (select \* from ec.module\_submission where csr = 1 and job\_code not in ('WACS40', 'WACS50', 'WACS60'). | Select **CSR** Employee Level | **Site** dropdown displays with all active CCO sites if user is Maximus employee; otherwise, Site dropdown displays with the user’s site only. | P |
| NS-CSR-I2 | Select a site | **Employee** dropdown displays;  **Program** dropdown displays. | P |
| NS-CSR-I3 | Select an employee | Supervisor name and Manager name display. | P |
| NS-CSR-I4 | Select a program | **Will you be delivering the coaching session?** radio button display. | P |
| **CSR** module – Mass/Team Submission | | | | |
| NS-CSR-M1 | User is configured with job code WACS40, WACS50, and WACS60 | Select **CSR** Employee Level | **Program** dropdown displays;  **Site** dropdown displays. | P |
| NS-CSR-M2 | Select a site | **Employee** dual list box displays with the employees from the selected site display in the non-selected box. | P |
| NS-CSR-M3 | Select more than 100 employees | Warning message displays – max number of employees can be selected 100 | P |
| NS-CSR-M4 | Select less than 100 employees | Warning message disappears. | P |
| NS-CSR-M5 | Click Add link | Add employee modal displays. | P |
| NS-CSR-M6 | Employee Add modal:  Select a site | Employee dropdown is populated with employees from the selected site. | P |
| NS-CSR-M7 | Select an employee;  Click Add | Employee Add modal disappears;  Selected employee is added in the non-selected dual box | P |
| End: **CSR** module – Mass/Team Submission | | | | |
| **ISG** module – Individual Submission | | | | |
| NS-ISG-I1 | Maximus user is configured with one of the following job codes (select \* from ec.module\_submission where isg = 1 and job\_code not in (‘WACS50’, ‘WPPM50’). | Select **ISG** Employee Level | **Site** dropdown displays with all active CCO sites. | P |
| NS-ISG-I2 | Select a site | **Employee** dropdown displays;  **Program** dropdown displays. | P |
| NS-ISG-3 | Select an employee | Supervisor name and Manager name display. | P |
| NS-ISG-I4 | Select a program | **Will you be delivering the coaching session?** radio button display. | P |
| **ISG** module – Mass/Team Submission | | | | |
| NS-ISG-M1 | User is configured with job code WACS50 or WPPM50 | Select **ISG** Employee Level | **Program** dropdown displays;  **Site** dropdown displays. | P |
| NS-ISG-M2 | Select a site | **Employee** dual list box displays with the employees from the selected site display in the non-selected box. | P |
| NS-ISG-M3 | Select more than 100 employees | Warning message displays – max number of employees can be selected 100 | P |
| NS-ISG-M4 | Select less than 100 employees | Warning message disappears. | P |
| NS-ISG-M5 | Click Add link | Add employee modal displays. | P |
| NS-ISG-M6 | Employee Add modal:  Select a site | Employee dropdown is populated with employees from the selected site. | P |
| NS-ISG-M7 | Select an employee;  Click Add | Employee Add modal disappears;  Selected employee is added in the non-selected dual box | P |
| End: **ISG** module – Mass/Team Submission | | | | |
| **Production Planning** – Individual Submission | | | | |
| NS-PP-I1 | Maximus user is configured with one of the following job codes (select \* from ec.module\_submission where productionplanning=1) except for the following job codes.  WMPR40  WPOP60  WCWF50. | Select **Production Planning** Employee Level | **Site** dropdown displays with all active CCO sites plus “All Sites”..  **Employee** dropdown displays. | P |
| NS-PP-I2 | Select a Site | Supervisor name and Manager name display. | P |
| NS-PP-I3 | Select an Employee | **Will you be delivering the coaching session?** radio button display. | P |
| **Production Planning** – Mass/Team Submission | | | | |
| NS-PP-M1 | Maximus user is configured with job code  WMPR40  WPOP60  WCWF50. | Select **Production Planning** Employee Level | **Site** dropdown displays with all active CCO sites plus “All Sites”. | P |
| NS-PP-M2 | Select a site | **Employee** dual list box displays with the employees from the selected site display in the non-selected box. | P |
| NS-PP-M3 | Select more than 100 employees | Warning message displays – max number of employees can be selected 100 | P |
| NS-PP-M4 | Select less than 100 employees | Warning message disappears. | P |
| End: **Production Planning** – Mass/Team Submission | | | | |
| **Quality** module – Individual Submission | | | | |
| NS-Q-I1 | Maximus user is configured with one of the following job codes (select \* from ec.module\_submission where quality=1 and job\_code not in ('WACQ13', 'WACQ40', 'WPPM50'). | Select **Quality** Employee Level | **Program** dropdown displays.  **Employee** dropdown displays. | P |
| NS-Q-I2 | Select an employee | Supervisor name and Manager name display. | P |
| NS-Q-I3 | Select a program | **Will you be delivering the coaching session?** radio button display. | P |
| **Quality** module – Mass/Team Submission | | | | |
| NS-Q-M1 | Maximus user is configured with job code WACQ13 or WACQ40 or WPPM50. | Select **Quality** Employee Level | **Program** dropdown displays;  **Site** dropdown displays with all active CCO sites plus “All Sites”. | P |
| NS-Q-M2 | Select a site | **Employee** dual list box displays with the employees from the selected site display in the non-selected box. | P |
| NS-Q-M3 | Select more than 100 employees | Warning message displays – max number of employees can be selected 100 | P |
| NS-Q-M4 | Select less than 100 employees | Warning message disappears. | P |
| End: Quality module – Mass/Team Submission | | | | |
| **Supervisor** module – Individual Submission | | | | |
| NS-S-1 | User is configured with one of the following job code (select \* from ec.module\_submission where supervisor = 1 and job\_code not in ('WACS50', 'WACS60'). | Select **Quality** Employee Level | **Program** dropdown displays.  **Employee** dropdown displays. | P |
| NS-S-2 | Select an employee | Supervisor name and Manager name display. | P |
| NS-S-3 | Select a program | **Will you be delivering the coaching session?** radio button display. | P |
| **Supervisor** module – Mass/Team Submission | | | | |
| NS-S-M-1 | User is configured with job code WACS50 or WACS60. | Select **Supervisor** Employee Level | **Program** dropdown displays;  **Site** dropdown displays.  If user is Maximus employee, site dropdown shows all active CCO sites plus “All Sites”.  Otherwise, site dropdown shows the user’s site only. | P |
| NS-S-M-2 | Select a site | **Employee** dual list box displays with the employees from the selected site display in the non-selected box. | P |
| NS-S-M3 | Select more than 100 employees | Warning message displays – max number of employees can be selected 100 | P |
| NS-S-M4 | Select less than 100 employees | Warning message disappears. | P |
| End: Supervisor module – Mass/Team Submission | | | | |
| **End: NS-2** | | | | |
| NS-3 | Same as NS-CSR-I1 | Select **CSR** Employee Level  Select a program other than “Dual” and “Medicare”  Select a site  Select an employee  Select whether you are going to coach the selected employee  Select Coaching Reason “Claims View (Medicare Only)” | Error message displays:  "Claims View" is for Medicare only. You selected a non-medicare program. | P |
| NS-3-1 | Continue with NS-3  UnSelect Coaching Reason “Claims View (Medicare Only)” | Error message disappears. | P |
| NS-3-2 | Continue with NS-3  Select a program “Dual” or “Medicare” | Error message disappears. | P |
| NS-4 | User is configured with job code WACS40, WACS50, and WACS60 | Select **LSA** Employee Level | **Employee** dropdown displays | P |
| NS-5 | Same as NS-1 | Select **Training** Employee Level | **Behavior** dropdown displays.  **Employee** dropdown displays. | P |
| NS-6 | Same as NS-1 | Select **Yes** or **No** for **Will you be delivering the coaching session?** | Submission input fields display.  (See CCO\_eCoaching\_Log\_New\_Submission\_DD.docx for fields to be displayed) | P |
| NS-7 | Same as NS-1 | Leave some input fields blank;  Click Submit button | Validation error message display | P |
| NS-8 | Same as NS-1 | Enter valid data in all input fields;  Click Submit button | Log is submitted successfully;  Success message displays;  Page reset to the one as in NS-1.  Email notification is sent and result is correctly saved in database . | P |
| NS-9 | Same as NS-1 | Select Employee Level  Select an employee that report to you | Warning log submission is an option.  Radio button **Do you need to submit a progressive disciplinary coaching (WARNING)?** displays;  Default to No | P |
| NS-10 | Same as NS-1 | Select **Yes** (submit as a warning) | Warning input fields display;  (See CCO\_eCoaching\_Log\_New\_Submission\_DD.docx for fields to be displayed) | P |
| NS-11 | Same as NS-1 | Enter all required fields  Click Submit | Warning log is submitted successfully;  Success message displays; | P |
| NS-12 | Same as NS-1 | Same as NS-11  Try to submit a warning log that already exists. | Error message display to indicate that a same warning log was already submitted. | P |
| NS-13 | Same as NS-1 | Launch eCoaching Log Web application.  Click New Submission in the menu bar.  Select **CSR** Employee Level;  Enter all required information, except:  Select *ONLY* one coaching reason;  Select a coaching value (Opportunity or Reinforcement);  Do not select any sub coaching reason;  Click Submit | Validation error message displays:  **Failed to save your submission. Please ensure you have entered all required fields.** | P |
| NS-14 | Same as NS-1 | Repeat NS-13 for all other Employee Levels:  **ISG**  **LSA**  **Production Planning**  **Quality**  **Supervisor**  **Training** | Same as NS-13 | P |
| NS-15 | Same as NS-1 | Launch eCoaching Log Web application.  Click New Submission in the Menu bar.  Fill in all fields, except:  Leave confirm checkbox unchecked.  Click Submit | Validation error displays | P |
| NS-16 | Same as NS-1 | Repeat NS-15.  Click Cancel button | New Submission Page is reset to its initial display. | P |
| NS-17 | Same as NS-1  Select an Employee Level other than “Training”; | Fill in all information on the page.  Select a different Program from Program dropdown; | “Will you be delivering the coaching session?” radio button doesn’t get reset. | P |
| NS-18 | Same as NS-1  Select an Employee Level “Training” | Fill in all information on the page.  Select a different Behavior from Behavior dropdown; | “Will you be delivering the coaching session?” radio button doesn’t get reset. | P |
| NS-19 | User is configured as Manager | Launch eCoaching Log Web application.  Click New Submission in the menu bar. | New Submission page displays | P |
| NS-20 | Same as NS-20 | Select Employee Level **CSR**.  Go through all questions. | “Is Follow-up Required?” displays | P |
| NS-21 | Same as NS-20 | Select “Yes” | “Enter follow-up date:” and input box (calendar icon) displays | P |
| NS-21.1 | Same as NS-20 |  | Enter follow-up date | P |
| NS-22 | Same as NS-20 | Select “No” | “Enter follow-up date:” and input box (calendar icon) disappears | P |
| NS-23 | Same as NS-20 | Select “Work From Home (Return to Site Only)” as Coaching Reason | The following displays in “Provide details of the behavior to be coached:” section:  CCO employees who participate in the CCO Work From Home are obligated to comply with all Maximus policies and procedures. The purpose of this eCL is to notify you that your CCO Remote Work Agreement is being rescinded.  Effective you will be required to report to work at the site. You will be reporting to . Any wages adjustments that were completed based on your remote status and the county you live in will be adjusted to reflect the location you are working and your position.  Any equipment you have received for the Work From Home assignment should be returned to your supervisor on your first day of reporting to the site.  Maximus anticipates that a mutually beneficial employment relationship will continue as you work at the site. | P |
| NS-23.1 | Same as NS-23 | Click Submit without filling in Effective Date, Return Site, Report Supervisor. | Validation error message displays indicating Effective Date, Return Site, and Report Supervisor are required. | P |
| NS-24 | User is configured to have to be able to submit eCL for Quality Specialists | Launch eCoaching Log Web application.  Click New Submission in the menu bar.  Select Quality in Employee Level dropdown.  Go through all questions.  Select Coaching Reason – Performance, Feedback, and Development (PFD) | The following question displays:  Select the date the PFD was completed: | P |
| Submit | | | | |
| NS-25 | Same as NS-1 | Complete all the input fields on the page;  Click Submit | Log(s) successfully created in database;  Email(s) successfully saved in database; | P |
| Email Notification | | | | |
| NS-26 | NA | NA | Email(s) from NS-25 will get sent within 10 minutes. | P |

**ASR Coaching Log Submission:**

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| **Test Case ID** | **Test Data Setup** | **Action** | **Expected Result** | **Pass/Fail** |
| NS-ASR-1 | Same as NS-CSR-I1 | Repeat NS-1, NS-CSR-I1, NS-CSR-I2, NS-CSR-I3, and NS-CSR-I4.  Select **Yes** to question “**Will you be delivering the coaching session?”** | **“Automated Supervisor Reporting”** appears as an option in dropdown “How was the coaching opportunity identified?”  Question “Is this a Customer Service Escalation (CSE)?” is disabled.  “Call Efficiency” is the only option under “Select the Type of Coaching from the Categories:”  “Opportunity” and “Reinforcement” radio buttons display under “Call Efficiency”.  Only able to select one sub coaching reason.  Question “Is follow-up required?” displays and is enabled. | P |
| NS-ASR-2 | Repeat NS-1, NS-CSR-I1, NS-CSR-I2, NS-CSR-I3, and NS-CSR-I4.  Select **No** to question “**Will you be delivering the coaching session?”** | **“Automated Supervisor Reporting”** appears as an option in dropdown “How was the coaching opportunity identified?”  Question “Is this a Customer Service Escalation (CSE)?” is disabled.  “Call Efficiency” is the only option under “Select the Type of Coaching from the Categories:”  “Opportunity” and “Reinforcement” and “Research Required” radio buttons display under “Call Efficiency”.  Only able to select one sub coaching reason.  Question “Is follow-up required?” is disabled. | P |

**Subcontractor Coaching Log Submission:**

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| **Module** | **Submitter** | **Expected** | **Comment** | **Pass/Fail** |
| CSR | **Authorized subcontractor users.**  select emp\_Id, emp\_job\_code, emp\_site from ec.Employee\_Hierarchy eh  join ec.Module\_Submission ms on ms.Job\_Code = eh.Emp\_Job\_Code  where csr = 1 and isSUb = 'Y' and end\_date='99991231'  order by emp\_site, emp\_job\_code, emp\_id; | **Site Dropdown:**  Consists of only the user’s site;  **Employee Selection List:**  Consists of only CSRs from the user’s Site. | Authorized subcontractor users can only submit logs for their own sites. | P |
| **Authorized CCO users (with PMA role).**  OPEN SYMMETRIC KEY [CoachingKey] DECRYPTION BY CERTIFICATE [CoachingCert];  select emp\_Id, emp\_job\_code, emp\_site from ec.Employee\_Hierarchy eh  join ec.Module\_Submission ms on ms.Job\_Code = eh.Emp\_Job\_Code  join ec.Historical\_Dashboard\_ACL hda on CONVERT(nvarchar(30),DecryptByKey(hda.user\_lanid)) = CONVERT(nvarchar(30),DecryptByKey(eh.Emp\_LanID))  where csr = 1 and eh.end\_date='99991231' and hda.end\_date = '99991231' and isSub = 'N' and hda.Role = 'PMA'  order by emp\_site, emp\_job\_code, emp\_id;  CLOSE SYMMETRIC KEY [CoachingKey]; | **Employee Selection List:**  Consists of all CSRs from all subcontractor sites and all CCO sites. | Authorized CCO users can submit logs for all CSRs from all subcontractor sites and all CCO sites. | P |
| Supervisor | **Authorized subcontractor users.**  select emp\_Id, emp\_job\_code from ec.Employee\_Hierarchy eh  join ec.Module\_Submission ms on ms.Job\_Code = eh.Emp\_Job\_Code  where supervisor = 1 and isSUb = 'Y' and end\_date='99991231'  order by emp\_job\_code, emp\_id; | **Employee Selection List:**  Consists of only supervisors from the user’s Site. | Authorized subcontractor users can only submit logs for their own sites. | P |
| **Authorized CCO users (with PMA role).**  OPEN SYMMETRIC KEY [CoachingKey] DECRYPTION BY CERTIFICATE [CoachingCert];  select emp\_Id, emp\_job\_code, emp\_site from ec.Employee\_Hierarchy eh  join ec.Module\_Submission ms on ms.Job\_Code = eh.Emp\_Job\_Code  join ec.Historical\_Dashboard\_ACL hda on CONVERT(nvarchar(30),DecryptByKey(hda.user\_lanid)) = CONVERT(nvarchar(30),DecryptByKey(eh.Emp\_LanID))  where supervisor = 1 and eh.end\_date='99991231' and hda.end\_date = '99991231' and isSub = 'N' and hda.Role = 'PMA'  order by emp\_site, emp\_job\_code, emp\_id;  CLOSE SYMMETRIC KEY [CoachingKey]; | **Employee Selection List:**  Consists of all supervisors from all subcontractor sites and all CCO sites. | Authorized CCO users can submit logs for all supervisors from all subcontractor sites and all CCO sites. | P |
| Training | **Authorized subcontractor users.**  select emp\_Id, emp\_job\_code from ec.Employee\_Hierarchy eh  join ec.Module\_Submission ms on ms.Job\_Code = eh.Emp\_Job\_Code  where training = 1 and isSUb = 'Y' and end\_date='99991231'  order by emp\_job\_code, emp\_id | **Employee Selection List:**  Consists of only trainers from the user’s Site. | Authorized subcontractor users can only submit logs for their own sites. | P |
| Training | **Authorized CCO users (with PMA role).**  OPEN SYMMETRIC KEY [CoachingKey] DECRYPTION BY CERTIFICATE [CoachingCert];  select emp\_Id, emp\_job\_code, emp\_site from ec.Employee\_Hierarchy eh  join ec.Module\_Submission ms on ms.Job\_Code = eh.Emp\_Job\_Code  where training = 1 and eh.end\_date='99991231' and hda.end\_date = '99991231' and isSub = 'Y'  order by emp\_site, emp\_job\_code, emp\_id;  CLOSE SYMMETRIC KEY [CoachingKey]; | **Employee Selection List:**  Consists of all trainers from all subcontractor sites and all CCO sites. | Authorized CCO users can submit logs for all trainers from all subcontractor sites and all CCO sites. | P |

**Subcontractor Warning Log Submission:**

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| **Module** | **Submitter** | **Action** | **Expected** | **Comment** | **Pass/Fail** |
| CSR | **User is the supervisor/manager of the employee.** | Select Employee Level **CSR**.  Select Program.  Select Site.  Select an employee in the user’s hierarchy.  Select **Yes** for “Will you be delivering the coaching session?” | “Do you need to submit a progressive disciplinary coaching (WARNING)?” does NOT display. | No warning logs for subcontractors | P |
| Supervisor | **User is the supervisor/manager of the employee.** | Select Employee Level **Supervisor**.  Select Program.  Select an employee in the user’s hierarchy.  Select **Yes** for “Will you be delivering the coaching session?” | “Do you need to submit a progressive disciplinary coaching (WARNING)?” does NOT display. | No warning logs for subcontractors | P |
| Training | **User is the supervisor/manager of the employee.** | Select Employee Level **Training**.  Select Behavior.  Select an employee in the user’s hierarchy.  Select **Yes** for “Will you be delivering the coaching session?” | “Do you need to submit a progressive disciplinary coaching (WARNING)?” does NOT display. | No warning logs for subcontractors | P |

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| Name of Tester: Lili Huang |  | Date Completed: 07/26/2024 |
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