

# EFS Modernization Test Script

Release 3.0 – Admin Functions –  
Child Care Application and Authorization (CCAA) Referral Process

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**Version 1.0**  
**Date: 05/11/2018**



## 1. Test Script Overview

Test scripts guide a tester through a series of steps designed to test the system's actual behavior against expected outcomes. Definitions for fields shown within test scripts are as follows.

**TEST SCRIPT DESCRIPTION:** A description of the functionality being tested from the user's point of view.

**ASSUMPTION:** An assumption that must be true for the tester to successfully perform a test script.

**STEP:** The step number.

**DESCRIPTION:** A description of the actions the tester should perform to complete a step.

**EXPECTED RESULTS:** The expected outcome of the actions described in the step's description. Testers will compare actual results against the expected results to determine whether release 3.0 functionality has passed each step.

**PASS:** Testers will indicate release 3.0 functionality passed a step by placing a check or X in the step's "Pass" column.

**FAIL:** Testers will indicate whether release 3.0 functionality failed a step by placing a check or X in the step's "Fail" column.

**NOTES:** Placeholder for notes recorded by the tester.

Complete the test scripts in the order in which they appear in this document. Report all issues to the OEL project team at [service.desk@oel.myflorida.com](mailto:service.desk@oel.myflorida.com).

### User Acceptance Testing URLs

**Family Services:** <https://familyservicesbeta.floridaearlylearning.com/>

Access Key: **@ccessU@t**

**Provider Portal:** <https://providerservicesbeta.floridaearlylearning.com/>

If registering as a new user, enter the following credentials and register.

Taxpayer or Provider ID: **enter bogus 10-digit number**

License/Registration/Exemption number or EXEMPT: **EXEMPT**

**Coalition Services:** <https://coalitionservicesbeta.floridaearlylearning.com/>

If registering as a new user, enter the following credentials.

Access user name: **ELC\_Services@oel.myflorida.com**

Access password: **E@rlyle@rning**

Then send an email to [service.desk@oel.myflorida.com](mailto:service.desk@oel.myflorida.com) and request account approval.

## 1.1. Tester Information

Complete the tester information fields in the table shown below. Field definitions are as follows:

- **TESTER NAME:** Enter your name in the space adjacent to *Tester Name*.
- **TEST DATE:** Enter the date you began testing in the space adjacent to *Test Date*.
- **PLATFORM:** Enter the platform that you are testing from.
- **BROWSER:** Enter the browser that you are testing from. The EFS Modernization will support Internet Explorer versions 10.0 and higher, and Google Chrome versions 40 and higher.
- **BROWSER VERSION:** Enter your browser's version in the *Version* row.

<b>TESTER NAME:</b>	<b>TEST DATE:</b>
<b>PLATFORM:</b> <input type="checkbox"/> Windows <input type="checkbox"/> Mac	
<b>BROWSER:</b> <input type="checkbox"/> Internet Explorer <input type="checkbox"/> Google Chrome <input type="checkbox"/> Safari <input type="checkbox"/> Mozilla	
<b>BROWSER VERSION:</b>	

## 2. Maintenance Tables

Various codes are stored in tables in the database and used throughout the system to help standardize data entry. Some of these codes can be viewed, created, or updated by users. In this section, we will review and update maintenance tables related to the CCAA process.

### 2.1. View the State Billing Groups

Test Script Number: CCAA-0201					
Test Script Description			Assumption		
View the billing groups maintained by the Office of Early Learning (OEL).  <u>Notes</u> 1. These values cannot be changed by the coalitions. 2. These billing groups are used throughout the system, including on the CCAA Referral Intake form.			The user has logged into the Coalition Portal as an ELC administrator.		
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	Select Maintenance → State Billing Groups from the menu.	The State Billing Groups page will be displayed. <ol style="list-style-type: none"> <li>A title is displayed for each billing group.</li> <li>All eligibility codes associated with the billing group are listed.</li> <li>A Yes/No value is displayed to indicate whether a match is required.</li> <li>There are no edit buttons present.</li> </ol>			
<b>NOTE:</b> Proceed to the next step.					

## 2.2. Add a Local Referring Agency

Test Script Number: CCAA-0202					
Test Script Description			Assumption		
Add a new local referring agency.  <u>Notes</u> <ol style="list-style-type: none"> <li>Coalition users only have authorization to view this page.</li> <li>This agency will appear in the dropdown list of referring agencies on the CCAA referral intake form when the IsActive flag is checked. Removing the check will cause the agency to be excluded from the dropdown.</li> </ol>			The user has logged into the Coalition Portal as a coalition administrator.		
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	Select Maintenance → CCAA → Referring Agencies from the menu.	The Local Referring Agencies List will be displayed.			
2.	Click the <b>Create New Referring Agency</b> button.	The Referring Agency - Create Record page is displayed.			
3.	Click <b>Save</b> .	Error messages should be displayed next to all required fields (indicated by a red asterisk).			
4.	Select the Agency Category.	The values are Coordinating Agency, DCF, WT Contracted Provider, and Privatization Provider.			
5.	Complete the form. <ol style="list-style-type: none"> <li>Make sure all required fields have been filled.</li> <li>Enter 7 characters or less for the Authorization Code.</li> </ol>	<ol style="list-style-type: none"> <li>The information is saved without errors.</li> <li>The Local Referring Agencies List is redisplayed.</li> <li>The new agency appears in the list.</li> </ol>			

	c. Place a check in the box next to IsActive. d. Click <b>Save</b> .	d. The Coalition ID has been added as a prefix to the authorization code.			
<b>NOTE:</b> End of test script. Proceed to the next script.					

### 3. CCAA Entry by Family

The CCAA Data Entry by Family sub-process begins when a family indicates on their SR application that they have a CCAA referral. Families that are determined to be ineligible based on the qualifying questions will be allowed to complete the application if they have a form from another agency entitled Child Care Application and Authorization. Once the application is submitted, the family will follow the normal flow of moving to the waiting list and being determined for funding.

#### 3.1. Create an SR Application

Test Script Number: CCAA-0301					
Test Script Description				Assumption	
Complete an SR application. Indicate that the family has a CCAA referral.				The user is logged into the Family Portal.  The family has never created an SR application or the previous SR application has a status of "Inactive".	
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	Click the <b>Create a new School Readiness application</b> button.	The Prequalification Questions page is displayed.			
2.	Answer the questions in a manner that will lead to ineligibility.	a. The CCAA Question pop-up will be displayed. b. The following question appears, "Do you have a form from another agency titled Child			

		Care Application and Authorization?"			
3.	Select <b>Yes</b> and click <b>Continue</b> .	<ul style="list-style-type: none"> <li>a. The message “Based on what you told us, your household may be eligible to get help paying for child care services” is displayed.</li> <li>b. The <b>Apply for School Readiness</b> button is displayed.</li> </ul>			
4.	Click the <b>Apply for School Readiness</b> button.	The Introduction and Instructions page of the school readiness application is displayed.			
5.	<p>Complete the SR application.</p> <ul style="list-style-type: none"> <li>a. Enter information on the Parent Profile, Additional Information, and Contact Information tabs.</li> <li>b. Enter information on the Child tab.</li> <li>c. Complete the Others and Other Income tabs as you choose.</li> <li>d. Attach documentation.</li> <li>e. Proceed to the Review Application tab.</li> </ul>	<ul style="list-style-type: none"> <li>a. Each page is displayed as expected.</li> <li>b. In the Additional Information section for the parent, “Yes” is selected for the question “do you have a form from another agency titled Child Care Application and Authorization? “</li> <li>c. On the Attach Documentation tab, the “Child Care Application and Authorization Form” is listed in step 1 as necessary documentation.</li> </ul>			
6.	<p>Review and submit the application.</p> <ul style="list-style-type: none"> <li>a. Verify all of the information is correct on the Review Application tab.</li> </ul>	<ul style="list-style-type: none"> <li>a. The information on the Review Application tab is correct.</li> <li>b. The application is submitted successfully.</li> </ul>			

	b. Sign and submit the application.				
<b>NOTE:</b> Proceed to the next step.					

### 3.2. Approve the SR Application

Test Script Number: CCAA-0302					
Test Script Description				Assumption	
Access the SR Application submitted work queue. Sort by the CCAA column. Verify the CCAA banner is displayed on the application and add the child or children to the waiting list.				<p>The user is logged into the Coalition Portal as an ELC user or ELC administrator.</p> <p>The parent’s address on the SR application is located in the user’s coalition.</p>	
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	Select SR Program → SR Application → Submitted from the menu.	<ul style="list-style-type: none"> <li>a. The Search Results page is displayed.</li> <li>b. A new column, CCAA, appears in the table.</li> <li>c. Applications with a check in the CCAA column are listed at the top.</li> <li>d. The CCAA flag is checked for the application that was submitted in the step above.</li> </ul>			
2.	Locate your application. Click the <b>Confirmation Number</b> link.	<ul style="list-style-type: none"> <li>a. The Review Application page is displayed.</li> <li>b. The banner “Child Care Application and Authorization Application:</li> </ul>			



		Documentation Required” is displayed.			
3.	Click the <b>Change Application Status</b> button.	The Change SR Application and Child Status page is displayed.			
4.	Place the child on the waiting list. a. Set the application status to “Active”. b. Set the child’s status to “Waiting”. Complete the priority, billing group, and eligibility. c. Click <b>Save</b> .	a. The information is saved without errors. b. The Review Application page is re-displayed.			
<b>NOTE:</b> Proceed to the next step.					

### 3.3. Send a Funding Notification

<b>Test Script Number: CCAA-0303</b>					
<b>Test Script Description</b>			<b>Assumption</b>		
Select a child from the SR waiting list and send a funding notification to the parent.  <u>Note</u> This activates the eligibility verification wizard in the family portal.			The child has a status of “Waiting”. A priority and billing group have been assigned.		
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	Select SR Program → SR Application → SR Eligibility Waiting List from the menu.	a. The SR Waiting List will be displayed. b. The child whose status was set to “Waiting” appears in the list.			

2.	Select the child and click the <b>Send Funding Notification</b> box. Click the <b>Generate Funding Notification</b> button.	<ul style="list-style-type: none"> <li>a. The child will be removed from the list.</li> <li>b. No messages are displayed.</li> <li>c. Child Status is changed to Pending Eligibility.</li> <li>d. An Eligibility Verification record is created for the household. It cannot be edited by the coalition user.</li> </ul>			
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**NOTE:** Proceed to the next step.

### 3.4. Complete the Eligibility Verification Wizard

Test Script Number: CCAA-0304					
Test Script Description			Assumption		
<p>Launch and complete the eligibility verification wizard. Indicate the parent has a CCAA referral and attach the document. Submit the eligibility verification.</p> <p><u>Note</u></p> <p>For detailed information on the completing the eligibility verification wizard, refer to the test script for SR Eligibility.</p>			<p>The user is logged into the Family Portal.</p> <p>A funding notification has been sent for at least one of the children in the household.</p>		
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	In the School Readiness Applications section, click the <b>Verify Eligibility</b> button.	The eligibility verification wizard will launch.			
2.	Click the <b>Start</b> button.	The Household Information is shown.			
3.	Verify or update the information in each section.	<ul style="list-style-type: none"> <li>a. The information is saved without errors on each page.</li> </ul>			

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	<ul style="list-style-type: none"> <li>a. On each page, click <b>Yes</b> to proceed.</li> <li>b. On the Have CCAA Form page, answer “Yes” to the question “Do you have a form from another agency titled Child Care Application and Authorization?”</li> <li>c. Attach CCAA Referral Documentation.</li> </ul>	<ul style="list-style-type: none"> <li>b. Documents are uploaded and attached properly.</li> <li>c. On the Review tab in the Has CCAA Form, the question is answered as “Yes”.</li> </ul>			
4.	Complete the Child Provider Information.	<ul style="list-style-type: none"> <li>a. Up to 3 provider selections can be made for each child.</li> <li>b. The parent is allowed to select a provider in a different county.</li> <li>c. If the child is not currently enrolled with a provider, an Estimated Start Date is required.</li> <li>d. When <b>Save</b> is clicked, the information is saved without errors.</li> </ul>			
5.	Attach supporting Documents.	Documents can be uploaded and attached.			
6.	Verify information on the Review tab.	<ul style="list-style-type: none"> <li>a. The information entered on the previous tabs is shown.</li> <li>b. The <b>Edit</b> buttons return you to the appropriate section.</li> </ul>			
7.	Sign and submit the Eligibility Verification.	<ul style="list-style-type: none"> <li>a. The verification cannot be submitted unless all required fields are completed.</li> <li>b. When <b>Submit Eligibility Verification</b></li> </ul>			

		is clicked, the verification is submitted without errors.			
8.	Exit the wizard.	<ul style="list-style-type: none"> <li>a. The dashboard is displayed.</li> <li>b. The <b>Verify Eligibility</b> button has been removed. The Eligibility Verification wizard is no longer accessible by the parent.</li> </ul>			

**NOTE:** Proceed to the next step.

### 3.5. Perform the Eligibility Verification Review

<b>Test Script Number: CCAA-0305</b>					
<b>Test Script Description</b>			<b>Assumption</b>		
Search for the eligibility verification in the Eligibility Verification Submitted queue. Verify the CCAA referral flag is set. Review the EV, identify the children associated with the referral, and add the referring agency's information.			The user is logged in to the coalition portal as an ELC user or ELC administrator.		
<b>Step</b>	<b>Description</b>	<b>Expected Results</b>	<b>Pass (X)</b>	<b>Fail (X)</b>	<b>Notes</b>
1.	Select SR Program → SR Eligibility → Eligibility Verification Submitted from the menu.	<ul style="list-style-type: none"> <li>a. The Search Results page is displayed.</li> <li>b. The child for whom the eligibility verification was submitted appears in the list.</li> <li>c. Yes appears in the CCAA column for the child.</li> </ul>			

<p>2.</p>	<p>Click the <b>Eligibility Verification Number</b>.</p>	<ul style="list-style-type: none"> <li>a. The eligibility verification is displayed with a status of “Submitted – Eligibility Verification”.</li> <li>b. The child’s eligibility status is “Pending Eligibility”.</li> <li>c. In the CCAA Referral Information section, the question is answered “Yes”.</li> <li>d. The CCAA Referral Document is shown. There are View and Associate Children buttons provided.</li> </ul>			
<p>3.</p>	<p>Click the <b>Associate Children</b> button.</p>	<p>The Edit – Associate CCAA Child pop-up is displayed.</p>			
<p>4.</p>	<p>Fill out the form.</p> <ul style="list-style-type: none"> <li>a. Select the child that was just added.</li> <li>b. Complete all other required fields.</li> <li>c. Click <b>Save</b>.</li> </ul>	<ul style="list-style-type: none"> <li>a. The child is linked to the referral.</li> <li>b. The child is listed in the CCAA Referral Information section.</li> <li>c. The referring agency’s information is shown correctly.</li> </ul>			
<p>5.</p>	<p>Make any other changes to the Eligibility Verification that you choose.</p> <ul style="list-style-type: none"> <li>a. Edit the information.</li> <li>b. Add or remove household members.</li> <li>c. Use the <b>Omit</b> checkboxes to exclude income from the household totals.</li> <li>d. Upload documents.</li> </ul>	<ul style="list-style-type: none"> <li>a. The Household at a Glance section is updated when people are added or removed.</li> <li>b. The Total Household Income Calculations are updated when income is added, removed, or omitted.</li> <li>c. Documents are attached as expected.</li> <li>d. Changes to address, child, or parent</li> </ul>			

		information are recorded in history.			
6.	Click the <b>Change Household Status</b> button.	The Change Household Eligibility Status page is displayed.			
7.	Set the EVR Status to “Active” and click <b>Save</b> .	The household status is updated to “Active”.			
<b>NOTE:</b> End of test script. Proceed to the next script.					

## 4. CCAA Data Entry by Coalition

The CCAA Data Entry by Coalition feature is used in situations where the ELC receives a referral document from a referring agency on behalf of a family that does not have a profile in the EFS Modernization system. This is most common in At-Risk referral cases. However, this functionality can be used in any CCAA Referral scenario to create a household and assign eligibility for referred children and families.

### 4.1. Complete the CCAA Referral Data Intake Form

<b>Test Script Number: CCAA-0401</b>					
<b>Test Script Description</b>				<b>Assumption</b>	
Enter the details of a CCAA referral data intake in order to create a Household record and Eligibility Verification record for a family that did not submit an SR Application.				The user is logged into the Coalition Portal. At least one local referring agency has been created.	
<b>Step</b>	<b>Description</b>	<b>Expected Results</b>	<b>Pass (X)</b>	<b>Fail (X)</b>	<b>Notes</b>
1.	Select SR Program → SR Eligibility → CCAA Referral → Create CCAA Referral from the menu.	The Create CCAA Referral – Intake Form is displayed.			
2.	Click the <b>Continue</b> button.	Error messages should be displayed next to all required fields.			

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3.	Click the Agency Category dropdown.	The values are Coordinating Agency, DCF, WT Contracted Provider, and Privatization Provider.			
4.	Select the Agency Category that matches the referring agency that you created. Click the <b>Agency Name</b> .	The referring agency that you created should appear in the dropdown list.			
5.	Complete all other fields.	The Billing Group Code and Eligibility Code are populated with the values listed on the State Billing Groups page.			
6.	Click the <b>Add Another Child</b> button.	A new section is added to enter the information for another child.			
7.	Add or remove children as you want. Then click <b>Continue</b> .	<ul style="list-style-type: none"> <li>a. The information is saved without errors.</li> <li>b. The Eligibility Verification (EV) page will be displayed.</li> <li>c. The household status is "Active".</li> </ul>			
<p><b>NOTE:</b> Proceed to the next step.</p>					

## 4.2. Review the Eligibility Verification

Test Script Number: CCAA-0402					
Test Script Description			Assumption		
Verify the information entered on the CCAA referral intake form was recorded correctly. Verify the household status is set to "Active" and the child's eligibility status is set to "Eligible".  <u>Note</u> <ol style="list-style-type: none"> <li>For additional information on completing the Eligibility Verification, refer to the SR Eligibility Process test script.</li> <li>Refer to the SR Enrollment Process test script for additional information on enrolling a child.</li> </ol>			The CCAA referral was created successfully.  The Eligibility Verification page is displayed.		
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	Review the Household at a Glance.	<ol style="list-style-type: none"> <li>The names of the primary parent and children entered on the referral are shown.</li> <li>The Other Household Members section is blank.</li> <li>All Total Household Income Calculations default to \$0.</li> </ol>			
2.	Click the <b>Case Notes</b> button.	<ol style="list-style-type: none"> <li>The creation of the eligibility verification is recorded.</li> <li>The username of the person that created the referral is recorded in the User column.</li> </ol>			
3.	Review the Contact Information.	<ol style="list-style-type: none"> <li>The address is shown as entered on the CCAA referral.</li> <li>Fake information appears for the</li> </ol>			



		<p>primary parent. It can be changed in the Parents section.</p> <p>c. Fake information appears for the family portal account. It cannot be changed at this time.</p> <p>d. There are <b>History</b> and <b>Edit</b> buttons.</p>			
4.	Click the <b>History</b> button.	<p>a. The Household Address History pop-up is displayed.</p> <p>b. The address information entered on the CCAA referral is shown.</p> <p>c. The username of the person that created the referral is recorded in the Modified By column.</p>			
5.	Click the <b>Close</b> button.	The pop-up closes.			
6.	Review the Children Needing Care.	<p>a. Each child added on the CCAA referral is displayed. Their Eligibility Status is "Eligible".</p> <p>b. The information shown matches what was entered.</p> <p>c. The following buttons are present for each child: <b>History, Change Status, Edit, Eligibility, and Enroll.</b></p>			
7.	Click the <b>History</b> button for each child. After reviewing the information, close the pop-up.	<p>a. The Person History pop-up is displayed.</p>			

		<ul style="list-style-type: none"> <li>b. The information entered on the CCAA referral is shown.</li> <li>c. The username of the person that created the referral is recorded in the Modified By column.</li> </ul>			
8.	Click the <b>Eligibility</b> button for each child.	<ul style="list-style-type: none"> <li>a. The Update Eligibility page is displayed.</li> <li>b. The eligibility information entered during completion of the CCAA Intake form appears in the Eligibility Assignment section.</li> </ul>			
9.	Review the Parents.	<ul style="list-style-type: none"> <li>a. The information entered for the primary parent is displayed.</li> <li>b. The following buttons are present: <b>History</b> and <b>Edit</b>.</li> </ul>			
10.	Click the <b>History</b> button. After reviewing the information, close the pop-up.	<ul style="list-style-type: none"> <li>a. The Person History pop-up is displayed.</li> <li>b. The information entered on the CCAA referral is shown.</li> <li>c. The username of the person that created the referral is recorded in the Modified By column.</li> </ul>			
11.	Review the CCAA Referral Information.	<ul style="list-style-type: none"> <li>a. Each child entered on the referral is listed.</li> <li>b. The information displayed matches what was entered for the referring agency.</li> </ul>			

		<ul style="list-style-type: none"> <li>c. There is an <b>Edit</b> button to change the referring agency’s information.</li> <li>d. There is an <b>Upload Document</b> button.</li> </ul>			
12.	Click the <b>Upload Document</b> button and select a file.	<ul style="list-style-type: none"> <li>a. The document is attached to the EV.</li> <li>b. The following buttons are present: <b>View</b> and <b>Associate Children</b>.</li> <li>c. Clicking the <b>View</b> button causes a copy of the document to be downloaded.</li> <li>d. The <b>Associate Children</b> button allows the user to link additional children to the referral.</li> </ul>			
13.	<p>Update the Eligibility Verification as you choose.</p> <ul style="list-style-type: none"> <li>a. Edit the information.</li> <li>b. Add or remove household members.</li> <li>c. Use the omit checkboxes to exclude income from the household totals.</li> <li>d. Upload documents.</li> </ul>	<ul style="list-style-type: none"> <li>a. Children that were added on the CCAA referral cannot be removed.</li> <li>b. Children that were added to the EV with an Eligibility status of “(new)” can be removed.</li> <li>c. The Household at a Glance section is updated when people are added or removed.</li> <li>d. The Total Household Income Calculations are updated when income is added, removed, or omitted.</li> <li>e. Documents are attached as expected.</li> <li>f. Changes to address, child, or parent</li> </ul>			

		information are recorded in history.			
<p><b>NOTE:</b> End of Test Script.</p>					

## 5. Reporting Results

### END OF DOCUMENT

Report UAT results to [service.desk@oel.myflorida.com](mailto:service.desk@oel.myflorida.com).

- For the email subject line please follow this format: **UAT – Coalition Name – Testers Name**
- Doing this will help our service desk route all UAT Scripts to the appropriate receiver in a timely fashion.

Here is an example:

The screenshot shows an email composition interface with the following fields and annotations:

- To:** Service Desk; (Annotation: Example of Subject Line)
- Cc:** (Empty)
- Subject:** UAT - ELC of XXXXX - Nilesh Amin (Annotation: Example of Subject Line)
- Attached:** EFSMod Release2.0 TestScript 8-23-16 V1.docx (303 KB) (Annotation: Attach your Test Script with Notes.)
- Body:** Provider Portal User: [oel.pp.qa+UAT01@gmail.com](mailto:oel.pp.qa+UAT01@gmail.com) (Annotation: Add your UAT account Information)  
 Provider ID: SITE 01 – 8948  
 Provider ID: SITE 02 – 8955  
[Etc...](#)

Thank You, UAT testers!