

# EFS Modernization Test Scripts

Release 3.4 – EFS Mod Guardianship Transfer

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**Version 1.0**  
**Date: 12/02/2018**



## 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 functionality has passed each step.

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

**FAIL:** Testers will indicate whether release 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 Portal:** Not available in Staging environment

**Provider Services Portal:** <https://providerservicesstaging.floridaearlylearning.com/Account/Login>

**Coalition Services Portal:** <https://coalitionservicesstaging.floridaearlylearning.com/Account/Login>

## 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>	

## 1.2. Guardianship Transfer Rules Overview

1. The Guardianship Transfer process is designed to only transfer children that have a School Readiness (SR) Eligibility Assignment and/or VPK Enrollment.
  - a. The child must exist in EFS-Mod.
  - b. The transfer process will not transfer a child that is on the SR Waiting List.
  - c. The transfer process will not transfer a child that has an Approved VPK application.
  - d. The records for an SR Waiting List and/or VPK Approved child must be made inactive in the old guardian's household and the new guardian is required to submit an application to enroll the child in the SR and/or VPK program.
  - e. The ELC user is responsible for inactivating all child records in the associated applications for children that are to be transferred out of a household. The EFS-Mod system will not automatically terminate or inactivate a child record in an application in association with a guardianship transfer process.
2. If the new guardian does not exist in EFS-Mod, the ELC user is now able to create the new guardian household within the Guardianship Transfer module by entering the required data elements to create a primary parent of a household. Once the new household is created, the new guardian can be searched for and selected for a transfer.
3. For SR, only the child's active eligibility authorization period and active eligibility assignment will be transferred to the new guardian's household. No SR child/provider enrollments will be transferred. The SR provider enrollment must be ended before the transfer will process.
  - a. When ending a child's enrollment in the guardianship transfer module, the ELC user must enter a past date. An enrollment cannot be ended on the same day a guardianship transfer is processed because it appears as though the old guardian is responsible for paying for an enrollment on a day that the child is no longer in their household.
4. For VPK, the child's provider enrollment will not be terminated. There will not be a break in service in order to avoid losing count of the child's accrued VPK hours. The child will remain enrolled with the VPK provider until the new guardian or ELC initiates a re-enrollment.
  - a. Only children with an enrollment status of **Enrolled** and **Enrollment Ended** will appear in the From Household transfer list.
  - b. If the child is going through a classroom transfer (the VPK enrollment status is **Change Requested**) at the time that a guardianship transfer becomes necessary, the classroom transfer must be completed before the guardianship transfer can be completed.
  - c. If the VPK enrollment status is **Enrollment Submitted**, the coalition must complete enrollment request before a guardianship transfer can be completed.
  - d. If the VPK enrollment status is **Enrollment Rejected**, a guardianship transfer cannot be completed. The coalition must re-open the VPK application to inactivate it; the new family must create a new VPK application for the child.
  - e. If the VPK enrollment status is **Enrollment Canceled**, a guardianship transfer cannot be completed. The coalition must re-open the VPK application to inactivate it; the new family must create a new VPK application for the child.
  - f. If the VPK enrollment status is **Coalition Reviewing** at the time that a guardianship transfer becomes necessary, the coalition must complete the enrollment request before the guardianship transfer can be completed.

5. In the Guardianship Transfer process, only one child can be transferred from a household at a time.
  - a. If a child is enrolled in both the SR program and the VPK program, that child will display as two separate children in the transfer list. That child's records will have to be transferred individually.
    - i. This may not be the case in situations where the coalition has merged the child's VPK and SR records into one person record for the child. In that case, the child will only be listed once in the transfer list.
  - b. Siblings that are being transferred to a new guardian will have to be transferred individually.
6. When the guardianship transfer process is completed:
  - a. For VPK the old guardian will only see **Enrollment Ended** for the transferred child's enrollment in the household. The old guardian will not have a view of the child's new enrollments or documents in the new guardian's household.
  - b. For SR the old guardian will not see the history of the child in their household
  - c. The new guardian will not see the history of the child's enrollment in the old guardian's household.
  - d. The new guardian will not have access to view any of the documents from the old guardian's household. The new guardian or the ELC must upload all required documentation for the child.
7. The Guardianship Transfer process allows a child to be transferred across coalitions. The county of the household to which the child is being transferred is used to identify the coalition that will receive the transferred SR eligibility/VPK enrollment.
8. Things To Come (Not Yet Developed):
  - a. Guardianship Transfer Work Queue
  - b. The ability to transfer a child back into a household they were originally transferred out of. At this time, completing this task should be done via the Merge Tool or through an EFS-Mod Data Fix request.

## 2. Household Search

The Guardianship Transfer feature is only accessible from the Coalition Portal Household Dashboard, in the top right corner of the Household Dashboard screen.

For VPK – Execute an application or enrollment search for the child or parent. In the results list, click on the parent name. The Household Dashboard showing all people in the household will display.

For SR – Execute an Eligibility Verification record search for the child or parent. Click on the child’s eligibility verification number. Then click the HH number in the EV. The Household Dashboard showing all people in the household will display.



### 2.1. Search for Current Guardian Household

<b>Test Script Number: GT-0201</b>	
<b>Test Script Description</b>	<b>Assumption</b>
Find Guardian Household. This search is to locate the household from which the child is to be transferred.	1. The user has logged into the Coalition Portal as an ELC user or admin.

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<p><b>Note:</b> The Guardianship Transfer search feature searches across all household in every coalition to find the parent. The search is not limited to only the households within the coalition completing the transfer.</p>			<p>2. The child and parent exist in EFS-Mod. 3. The child has an Eligibility Authorization period or VPK Enrollment.</p>		
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	<b>VPK</b> Select VPK Program → VPK Application → <b>Search</b> .	The VPK Application Search screen displays.			
2.	Enter the child’s or parent’s first and last name → <b>Search</b> .	The search result set displays on the lower portion of the screen			
3.	Click the <b>Parent First Name</b> .	<p>a. The Household Dashboard opens displaying all of the people (Children, Parents, and Other Household Members).</p> <p>b. The Guardianship Transfer button is present in the top right corner of the dashboard.</p> <p><b>End For VPK Guardian Search</b></p>			
4.	<b>SR</b> Select SR Program → SR Eligibility → <b>Search</b> .	The Search For A School Readiness Eligibility Verification screen displays.			
5.	Enter the child’s or parent’s first and last name → <b>Search</b> .	The Search Results screen displays.			

6.	Click the Eligibility Verification Number (EV_000000001).	The Eligibility Verification Review Screen displays.			
7.	Click the HH number (HH_000000011).	<p>a. The Household Dashboard opens displaying all of the people (Children, Parents, and Other Household Members).</p> <p>b. The <b>Guardianship Transfer</b> button is present in the top right corner of the dashboard.</p> <p>End For SR Guardian Search</p>			
8.	Click the <b>Guardianship Transfer</b> button.	<p>The Guardianship Transfer Screen displays the following sections:</p> <p>a. Search Guardian / Add Guardian buttons</p> <p>b. Details of New Parent / Guardian window</p> <p>c. Parent / Guardian relationship to child dropdown</p> <p>d. Transfer Reason dropdown</p> <p>e. From Household window displays children in the household</p> <p>f. To Household window is empty</p> <p>g. <b>Save</b> and <b>Cancel</b> buttons</p>			
<p><b>NOTE:</b> Proceed to next test script</p>					



## 2.2. Search for New Guardian Household

Test Script Number: GT-0202					
Test Script Description			Assumption		
This search is to find and select the new parent/guardian household to which the child(ren) are to be transferred.			1. The user has logged into the Coalition Portal as an ELC user or admin.  2. The new parent/guardian household currently exists in EFS-Mod.		
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	In the Guardianship Transfer screen click <b>Search</b> .	The Search for Parent/Guardian window opens.			
2.	Type in the parent/guardian's First and Last name → <b>Search</b> .  Note: Date of Birth can also be used as search criteria	The Search Results field displays all of the parent/guardians with the same name (and DOB if used in search).			
3.	Click on a Parent/Guardian name.	The details for that parent display in the Details of Selected Parent/Guardian Section.  a. Parent ID b. Parent Name c. Parent DOB d. County e. City f. Zip code			
4.	Click <b>OK</b> .	a. The selected parent's information displays on the Guardianship Transfer screen.			

		b. The From and To Household IDs are displayed.			
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**NOTE:** Proceed to the next step.

### 3. Create New Parent/Guardian Household

This feature allows the ELC to create a household in cases where the new parent/guardian has never submitted an application and created a household in EFS-Mod. This is generally the case, but not restricted to emergency (at-risk) transfers that take place. The ELC user is now able to bypass the Family Portal application submission process and establish a new active household in EFS-Mod.

#### 3.1. Create Household In EFS-Mod

Test Script Number: GT-0301					
Test Script Description			Assumption		
Create a new parent/guardian household to which a child is to be transferred into.			The new parent/guardian does not have an EFS-Mod account/household.		
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	On the Guardianship Transfer Screen, Click <b>Add Guardian</b> .	The Add Guardian screen displays. The user is required to populate key elements. <ul style="list-style-type: none"> <li>a. First Name</li> <li>b. Last Name</li> <li>c. Date Of Birth</li> <li>d. Email Address</li> <li>e. Ethnicity</li> <li>f. Race(s)</li> <li>g. Gender</li> <li>h. Address</li> <li>i. City</li> </ul>			

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		<ul style="list-style-type: none"> <li>j. State</li> <li>k. Zip Code</li> <li>l. Contact Number</li> </ul>			
2.	Populate all required fields, then click <b>Save</b> .	<p>A message is displayed stating: <i>Added New Parent/Guardian Successfully</i>.</p> <p>Click <b>Ok</b></p>			
3.	Type in the parent/guardian's First and Last name → <b>Search</b> .	The Search Results field displays the newly created parent/guardian.			
4.	Click on a Parent/Guardian name.	<p>The details for that parent display in the Details of Selected Parent/Guardian Section.</p> <ul style="list-style-type: none"> <li>a. Parent ID</li> <li>b. Parent Name</li> <li>c. Parent DOB</li> <li>d. County</li> <li>e. City</li> <li>f. Zip code</li> </ul>			
5.	Click <b>OK</b> .	<ul style="list-style-type: none"> <li>a. The selected parent's information displays on the Guardianship Transfer screen.</li> <li>b. The From and To Household IDs are displayed.</li> </ul>			
<p><b>NOTE:</b> Proceed to the next step.</p>					

## 4. Select and Transfer Child

### For SR –

Only children that have an active SR eligibility authorization period and active eligibility assignment can be transferred from one guardian to another. If the child status is Pending, Waiting, or New, the record must be inactivated in the old household and the new guardian should be required to submit an SR application to have the child placed on the waiting list.

For child with a Status of Eligible, the child's associated SR Application or CCAA authorization form that was used to establish the child's eligibility in the old household **will not** be transferred to or re-created in the new household. The ELC and the new guardian are required to upload all documentation to satisfy the SR policy requirements for SR Eligibility in the new guardian household.

### For VPK –

Only children that have a VPK Enrollment status of Enrolled or Enrollment Ended can be transferred from one guardian to another. The child's associated VPK Application that was used to establish the child's VPK Enrollment in the old household **will not** be transferred to or re-created in the new household. The child will retain their COE number, the provider enrollment will continue, and the hours used history will transfer.

### 4.1. Transferring an SR Eligible Child Into The New Household

Test Script Number: SREN-0401					
Test Script Description			Assumption		
<p>The follow steps involve selecting and transferring child from the Old Household to the New Household. This test case will include ending a child’s SR provider enrollment before the transfer processes.</p>			<p>The parent/guardian to which the child is being transferred has been selected.</p> <p>The child has an SR eligibility authorization period and eligibility assignment.</p> <p>The child has an active SR Provider enrollment that has not been ended prior to guardianship transfer.</p>		
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	<p>Select a Parent / Guardian relationship to child.</p> <p>Select a Transfer Reason.</p> <p>Click the name of the child being transferred and click the &gt;&gt; (move) button.</p>	<p>On the screen, the child shows as being moved from the old household to the new household, but the system has not initiated the transfer.</p>			
2.	<p>Click the <b>Complete Transfer</b> button.</p> <p><b>Note:</b> The SR Provider Enrollment was not ended prior to the transfer.</p>	<p>a. The screen displays the Child’s Active Enrollment.</p> <p>b. The user is required to end the enrollment before the transfer can proceed.</p>			
3.	<p>Enter the End Enrollment details → <b>Save</b>.</p>	<p>a. The enrollment is ended.</p> <p>b. A message is displayed stating: <i>Enrollment Ended for this Child Successfully.</i></p>			

		<p><b>Click the Close button</b>  <b>Click the Complete</b>  <b>Transfer button.</b></p> <ul style="list-style-type: none"> <li>c. The guardianship transfer proceeds and displays the message <i>"child has transferred to new household successfully"</i></li> <li>d. The child record is inactivated and removed from the old household.</li> <li>e. The old household status is in Coalition Reviewing status.</li> <li>f. A copy of the child's authorization period and eligibility assignment are activated in the new household.</li> <li>g. A new EV number is created for the child.</li> <li>h. The new guardian's Household is in Coalition Reviewing Status. From this status the ELC user is able to complete the review of the household before updating the child eligibility.</li> <li>i. The child status in the new household is Eligible.</li> <li>j. No SR application was created or backfilled for the child in the new household.</li> <li>k. No documents from the old household were copied into the new</li> </ul>			
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		<p>household on the Family Portal.</p> <p>l. The child does not have any active enrollments</p> <p>m. Case notes were added to both households displaying the from and to household transfer.</p>			
<p><b>NOTE:</b> Proceed to the next step.</p>					

#### 4.2. Transferring a VPK Child Into The New Household

<p><b>Test Script Number: SREN-0502</b></p>					
<p><b>Test Script Description</b></p>				<p><b>Assumption</b></p>	
<p>The following steps involve selecting and transferring a child from the Old Household to New Household. The VPK guardianship transfer does not require the child’s enrollment to be terminated.</p> <p>Note: In order to verify all of the test results for this test script the tester will need to have access to a VPK family portal account and a VPK provider portal account to confirm the results.</p>				<p>The parent/guardian to which the child is being transferred has been selected.</p> <p>The child status is either Enrolled or Enrollment Ended</p>	
Step	Description	Expected Results	Pass (X)	Fail (X)	Notes
1.	Review the Transfer Screen	Only children with a status of Enrolled or Enrollment Ended are displayed			
2.	Select a Parent / Guardian relationship to child. Select a Transfer Reason. Click the name of the child being transferred and click the >> (move) button.	On the screen, the child shows as being moved from the old household to the other, but the system has not initiated the transfer.			
3.	Click the <b>Complete Transfer</b> button.	a. The guardianship transfer proceeds and displays the message			

		<p><i>“child has transferred to new household successfully”.</i></p> <ul style="list-style-type: none"> <li>b. The child record is inactivated in the old household.</li> <li>c. The enrollment record in the old household enrollment record displays as Enrollment Ended.</li> <li>d. The child record is copied into the new household.</li> <li>e. The child has the same COE number.</li> <li>f. The provider enrollment is still intact, not ended.</li> <li>g. No VPK application was created or backfilled for the child in the new household.</li> <li>h. The old household application is in an Inactive status.</li> <li>i. No documents from the old household were copied into the new household.</li> <li>j. Case notes were added to both households displaying the from and to household transfer.</li> <li>k. If the child has an active enrollment, the enrollment was not ended and the new guardian is able to request a re-enrollment.</li> </ul>			
<p><b>NOTE:</b> Proceed to the next 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 form with the following fields and annotations:

- To...:** Service Desk; (Annotated with a box: "Example of Subject Line")
- CC...:** (Empty)
- Subject:** UAT - ELC of XXXXX - Nilesh Amin (Annotated with an arrow pointing to the subject line)
- Attached:** EFSMod\_Release2.0 TestScript 8-23-16 V1.docx (303 KB) (Annotated with a box: "Attach your Test Script with Notes.")
- Body:** Provider Portal User: [oel.pp.qa+UAT01@gmail.com](mailto:oel.pp.qa+UAT01@gmail.com) (Annotated with a box: "Add your UAT account Information")  
Provider ID: SITE 01 – 8948  
Provider ID: SITE 02 – 8955  
Etc...

Thank You, UAT testers!