

User Acceptance Testing

Indigo Service Pack 1 – General

Purpose

The purpose of this document is to aid in testing functionality included in Indigo Service Pack 1. As part of our User Acceptance testing process we require all test results from the Practice’s Acceptance Testing representative to be recorded in this document.

# Practice Details

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| --- | --- |
| Practice name |  |
| Assessor |  |
| Test date |  |

# Testing Criteria

Testing to be carried out:

1. **Software Testing -** Software testing will be done in a live environment to ensure the software is operating as expected.

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| Software Testing Criteria | |
| Pass | The function performs as expected. Note that all actions within the function must perform as expected to achieve a pass. |
| Fail | The function does not perform as expected and/or errors are encountered. Note that if any one action within the function fails, a fail must be recorded. |

Test Results - Software Testing

Instructions to complete:

1. Please test each function as described below, comparing your result to the Expected Outcome column.
2. Complete the table indicating your result for each test, using the Testing Criteria on Page 1.
3. Where a fail is recorded, please include comments of this failure.

| **Test description** | **Expected outcome** | **Pass** | **Fail** | **N/A** | **Comment** |
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| **Bp Comms Consent and Enrolment** | | | | | |
| **Clinic configuration** | | | | | |
| Configure your Clinics SMS consent and enrolment settings via  **Setup → Configuration → Bp Comms** | Able to select and save the required SMS message types. |  |  |  | *Note: This determines what will be available for the Patients to consent to.* ***See Page 4 of Bp Comms User guide*** |
| Configure your Clinics level of enrolment via  **Setup → Configuration → Bp Comms** | Able to select 2-stage verification (default) |  |  |  | *Note:* ***See Page 6 of Bp Comms User guide*** |
| Configure your Clinics level of enrolment via  **Setup → Configuration → Bp Comms** | Able to select 1-stage enrolment (not default) |  |  |  |  |
| **Patient Consent** | | | | | |
| Open a Patient and enrol their mobile phone number  **File → Open Patient → View details** | Able to carry out the 2-stage verification process to a Patients nominated mobile number successfully. |  |  |  | *Note:*   * *If the mobile number is a duplicate a message prompt will appear identifying the other patients using the same mobile number* * *2-stage verification - Code is sent to patient’s mobile number and the patient notifies the practice of the code within 5 minutes* |
| Open a Patient and enrol their mobile phone number  **File → Open Patient → View details** | Able to carry out the 1-stage enablement process to a Patients nominated mobile number successfully. |  |  |  | *Note:*   * *If the mobile number is a duplicate a message prompt will appear identifying the other patients using the same mobile number* * *1-stage enablement is where a message is sent to the patient’s mobile number* |
| Open a Patient and update the SMS Consent Options they want to opt into.  **File → Open Patient → View details** | Able to select and update the Consent Options for a patient successfully. |  |  |  |  |
| Open a Patient and import a signed consent form and link it to the patient.  **File → Open Patient → View details → BpComms Consent** | Able to import and link a signed patient consent form via Bp Comms Consent screen successfully. |  |  |  |  |

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| **Enhanced SMS functionality** | | | | | |
| **Test description** | **Expected outcome** | **Pass** | **Fail** | **N/A** | **Comment** |
| **Setup Bp Comms Templates for SMS** | | | | | |
| Create SMS templates for the different SMS message types | Able to create templates for the different SMS message types successfully.   |  | | --- | | Appointment | | Clinical Reminder | | Results | | Inbox | | Follow up Inbox | | Patient record | | Search utility | | |  | | --- | |  | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | |  | |  |
| Create or Edit SMS Default Templates, customised for your Practice  **Set up → Configuration → Templates** | Able to create or customise SMS Default Templates without errors.   |  | | --- | | Appointment | | Clinical Reminder | | Results | | Inbox | | Follow up Inbox | | Patient record | | Search utility | | |  | | --- | |  | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | |  | | Default is set for each template type so should be same as above |
| **Compose and Send SMS using Bp Comms Template.** | | | | | |
| **Test description** | **Expected outcome** | **Pass** | **Fail** | **N/A** | **Comment** |
| Send an SMS message to a Patient – test case 1 | Able to successfully send an SMS to a Patient via   |  | | --- | | Clinical Reminder | | Results | | Inbox | | Follow up Inbox | | Patient record | | Search utility | | |  | | --- | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | |  |
| Send an SMS message to a Patient – test case 2 | Able to successfully send an SMS to a Patient via   |  | | --- | | Clinical Reminder | | Results | | Inbox | | Follow up Inbox | | Patient record | | Search utility | | |  | | --- | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | |  |

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| **Contact Notes** | | | | | |
| **Test description** | **Expected outcome** | **Pass** | **Fail** | **N/A** | **Comment** |
| **Contact Notes ‘Management’** | | | | | |
| Change Contact notes filter as desired by date range, reason, method or status.  **View → Contact notes** | Able to change contact notes filter as required by date range, reason, method or status successfully. |  |  |  |  |
| **Viewing Contact Notes – all patients** | | | | | |
| View Contact notes screen and select and open a record.  **View → Contact Notes** | Able to view the Contact Notes List screen and select and open a record via Contact Notes screen successfully. |  |  |  | *Note: Any failed Contact Notes attempts over the past (set time) will appear at the top of the list.* |
| **Viewing Contact Notes – one patient** | | | | | |
| Open a Patient record and view their contact notes.    **Patient record → View → Contact notes** | Able to successfully view the Contact Notes for a given Patient via their clinical record. |  |  |  |  |
| Open a Patient and view their contact note records via Demographic ‘Edit patient’ screen.  **Select patient → View details → Contact notes** | Able to successfully view Contact Notes for a given Patient via Demographic ‘Edit patient’ screen. |  |  |  |  |
| **Creating a Contact note** | | | | | |
| **Test description** | **Expected outcome** | **Pass** | **Fail** | **N/A** | **Comment** |
| Create a contact note for a Patient – test case 1 | Able to successfully create a contact note via:   |  | | --- | | Appointment book | | Follow up Reminders | | Follow up Inbox | | Patient demographics | | Patient list | | Patient record | | |  | | --- | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | | *Note:* ***See Page 27 of Bp Comms User guide*** |
| Create a contact note for a Patient – test case 2 | Able to successfully create a contact note via:   |  | | --- | | Appointment book | | Follow up Reminders | | Follow up Inbox | | Patient demographics | | Patient list | | Patient record | | |  | | --- | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | | |  | | --- | |  | |  | |  | |  | |  | |  | | *Note:* ***See Page 27 of Bp Comms User guide*** |

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| **Referral Directory** | | | | | |
| **HealthShare** | | | | | |
| **Test description** | **Expected outcome** | **Pass** | **Fail** | **N/A** | **Comment** |
| Select ‘HealthShare’ as the Default Address Book  **Setup** **→ Preferences → Letters** | Able to select and save ‘HealthShare’ as the default address book for letters successfully. |  |  |  |  |
| The HealthShare Address Book is the default when using the Bp Word-Processor | When using the Bp Word Processor, the HealthShare Address Book appears as the Default Address Book. |  |  |  |  |

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| **Online Directory** | | | | | |
| **HealthLink** | | | | | |
| **Test description** | **Expected outcome** | **Pass** | **Fail** | **N/A** | **Comment** |
| Configure HealthLink to be your Default Online Directory for Contacts in your Configuration options  **Setup → configuration → Online Directory for Contacts** | Able to select HealthLink as your Default Online Directory for Contacts in your Configuration options successfully. |  |  |  |  |
| Configure your Letter preferences to ‘Display Online Directory on contact selection screen’  **Setup → Preferences → Letters** | Able to select the checkbox and save letter preferences to ‘Display Online Directory on contact selection screen’ successfully. |  |  |  |  |
| Create a Letter and check the Online Directory for Contacts is working. | When creating a letter and searching for an addressee, the Online Directory is returning results successfully when ‘From Address book’ tab is selected. |  |  |  |  |
| Search surrounding areas of Postcode for Providers | When searching for a Provider, enter the postcode and select a Maximum Distance of 5km to 100km to access additional Providers |  |  |  |  |