*Testing Procedures  
for AWARE*

*Determining Your Caseload Number*

To the Tester: This is a walkthrough on how to determine what your **Caseload Number** is. The steps will also show you how to set that caseload number as your default caseload search.

1. Login to Aware

2. Search for Caseload Number

3. Update Preferences

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| Activity Name | Testing Procedure Notes |
| **Objective 1: Login to Aware** | |
| **1.01 Enter Username** | * For ***UAT Environment*** using a Chrome browser, navigate to: <https://test.ny.hostedaware.com/Awareuat> and enter your Username. |
| **1.02 Enter Password** | * Enter your password and click the **Log In** button. |
| **Objective 2: Search for Caseload Number** | |
| **2.01 Open Participant Module** | * Open the **Participant** module. The **Case Search** page displays. |
| **2.02 Select The Layout Tab** | * Select the Layout tab. The **New Case Search** page displays. |
| **2.03 Change Selected Layout to Caseload - Open** | * Use the **Selected Layout** drop down arrow to select “Caseload - Open” and select **Apply.** |
| **2.04 Select the Search Tab** | * On the Case Search page, select the Search Tab. |
| **2.05 Clear Caseload (5 max) Field** | * Once you have selected the **Search** tab, in the **Caseload (5 max)** field, use the ‘X’ token to clear the field.      * Once the **Caseload (5 max)** field is empty, use the **Select** button to search for a list of Caseloads. |
| **2.06 Search in Caseload Mini-Search Window** | * The **Caseload Mini-Search** window will appear. * In section 2: **Results of Search**, you can scroll to see a list of all available caseloads. |
| **2.07 Filter Your Search** | * You can also filter your search results to get more concise findings. * In Section 1 on the **Caseload Mini-Search** window, in the Primary field, type in either your first name, or the first name of the staff member you would have caseload access for. Then select **Find**. |
| **2.08 Search for Results** | * In section 2: **Results of Search**, on the Caseload Mini-Search window, write down the Caseload number for the corresponding caseload. This will be the number you use when entering caseloads or setting your preferences.      * NOTE: You do not need to select the caseload at this time, rather write it down and remember it for the next step. * Select **Cancel** until you are back to the Aware Landing Page. |
| **Objective 3: Update Preferences** | |
| **3.01 Open Preferences Page** | * From the **Aware Landing Page**, select the **Preferences** button. |
| **3.02 Enter Case Search Default Caseload** | * In the **Participant** section, in the **“Case Search Default Caseload”** field, enter in the caseload number that you looked up in **step 2.08**.      * Select **Finish** to save your changes. |
| **3.03 Verify Changes** | * Open the **Participant** module. The **Case Search** page displays. * Select the Layout tab. The **New Case Search** page displays.      * Use the **Selected Layout** drop down arrow to select “Caseload - Open” and select **Apply.**      * Once you select **Apply**, you will see the new default caseload search appear. |