*Testing Procedures  
for AWARE*

*Eligible - Case Status and Auto Generated Letter*

To the Tester: The step-by-step instructions below are provided for you to complete the process of working your case from Application to Eligible status, you will complete the following objectives:

Note: You will need to adjust your Aware Preferences for the Auto Generated Letter to become available. See

Pre-Test: Update Preferences

1. Determine Eligibility

2. Resolve ToDos and Move to Case Status: Eligible

3. Capture Case Notes

4. Manage Activity Due Reminders

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| Activity Name | Testing Procedure Notes |
| **Pre-Test Step: Update Preferences to Allow for Auto Generated Letters** | |
| **0.01 Select Preferences** | * From the AWARE home page, select the **Preferences** tab. |
| **0.02 Check “Display Auto-Letter Generated Prompt”** | * From your **Preferences** page, in Section 1: Staff Preferences, select the box for **“Display Auto-Letter Generation Prompt”.**      * Select **Finish** to save your changes. |
| **Objective 1: Determine Eligibility** | |
| **1.01 Select Participant** | * From the **AWARE Home Screen** Select the **Participant Module**.      * Select an individual from your case search grid that you have completed all steps for **Case Entry/Application**. This individual will still be in case status: **Application**. Note that you can filter your caseload by typing in ***application*** in the provided parameter field under **Case Status** in the grid. |
| **1.02 Display Participant Pages** | * From the **Case Management** page, select the **Pages** link from the menu bar. The **Participant Pages** displays. |
| **1.03 Display Eligibility Determination Page** | * In Section 2: Eligibility on **Participant Pages**, select the **Eligibility Determination** link.      * The **Eligibility Determination** page displays.     NOTE: Eligibility Date is read only at this point. |
| **1.04 Impediments to Employment** | * In Section 3: Impediment to Employment on the **Eligibility Determination** page, check at least one of the options for **Impediments Options** *and* enter text in the narrative box titled **Other**. |
| **1.05 Documentation** | * In Section 4: Documentation on the **Eligibility Determination** page, select at least one item from the **Eligibility Rational Options** *and* enter text into the narrative box titled **Other** for this section. |
| **Objective 2: Resolve ToDos and Move to Eligible Case Status** | |
| **2.01 Display ToDo Page** | * Back at the top of the **Eligibility Determination** page, in Section 1: Determination, select the **Check ToDo Indicators** button.      * The ToDo page Displays. NOTE: The following image is an example of which ToDos may be listed – depending on what you completed or have forgotten. |
| **2.02 Select First ToDo** | * On the ToDo page, select the first **ToDo** and fill in the required (\*\*) information. This should be an **Impediment to Employment** ToDo.      * On the main menu select **Finish** to return to the ToDo page (if you have any more ToDo.) |
| **2.03 Complete Additional ToDo’s If Needed** | * On the ToDo page, complete the remaining ToDos for your individual and select **Finish** to save any changes. After all ToDos are complete and you have saved your changes, you should see one more ToDo for **Eligibility Determination** appear – **Eligibility Date** is required. |
| **2.04 Enter Eligibility Date and Select OK** | * Select the **Eligibility Date is required. (Personal Security Required)** ToDo. ***Aware*** displays the Eligibility Determination page with the cursor on the newly editable Eligibility Date field. * Enter today’s date and select **Finish** on the main menu bar to save all changes on the page. You will see an alert box asking you to confirm.      * Select the **OK** button to move case to **Eligible** status. |
| **2.05 Launch Auto-Letter Generated Template** | * An additional alert box will display asking if you want to generate an Eligibility Letter. **Select** OK.      * This will launch the **Auto-Letter Generation Template Selection** mini-data page. |
| **2.06 Select Auto Generated Letter** | * In section 1: Select the **Letter Template** you wish to auto-generate.      * This will launch the **Letter Fill In** data page.      * **Complete** the fields in the **Letter Fill In Preview.**      * At the top left of the **Letters Fill In** pop-up window select the **Letter Preview** button to generate a preview of your completed letter. At this point you *can* print or download the letter as needed. |
| **2.07 Finish to Save Letter** | * First, close the **Letter Preview** by clicking the ‘X’. * On the **Letters Fill In** window select **Finish** on the main menu to save your letter.      * This will generate another preview of this letter. This is the official preview of the letter that was saved. *Why?* Well let’s say when you previewed the letter in **step 2.06** you saw a typo, corrected it, and saved your letter. This final preview is a final account of what was saved. You *can* print or download at this time if you like.      * Now, close the (finalized) **Letter Preview** by clicking the ‘X’. This will return you to the **Case Management** page for your participant. |
| **2.08 Verify Case Status Eligible** | * From the **Case Management** page verify that the **Case Status** for your participant is now **Eligible**. |
| **2.09 Verify Letter is in Case Notes** | * From the **Case Management** page, use the **Selected Layout** drop-down to select **Notes – All.**      * Select **Apply**, and the **Case Note** records for your participant will appear.        * Verify that the auto-generated letter is listed in your records table. |
| **Objective 3: View and Create Case Note** | |
| **3.01 Select Case Note** | * Even though you have not directly created a **Case Note** yet, one was generated when you created the letter in **Objective 3** above. * Select the **Case Note** link in the records grid. |
| **3.02 Verify Case Note Page Displays** | * Verify that the **Case Note** page for participant displays      * Note: The number of days you will be able to edit/delete a case note is set to 10. * At this point you could use the **View Letter** button in Section 2: Note to view, print or download your letter as needed. * Select **Cancel** on the main menu to return to the **Case Management** page. |
| **3.03 Select New Case Note** | * From the **Selected Layout Notes – Case** on the **Case Management** page, select **New** above the records grid. This will display the **Case Note** page for participant. |
| **3.04 Select Category** | * In Section 1: General on the Case Note page for participant, use the drop-down list to select a **Category\***. |
| **3.05 Enter Summary** | * In Section 2: Note, enter text into the **Summary\*** field. |
| **3.06 Enter Case Note Text** | * In Section 2: Note, enter text into the **Enter Case Note** narrative field.      * Select the **Finish** link to save your case note and return to the **Case Management** page. |
| **3.07 Verify Case Note In Records Grid** | * On the Case Management page, verify that your Case Note is now recorded in the records grid. |
| **3.08 Display All Activities Report** | * Select **Actions** from the menu bar and then select **Print Reports for All Activities**. You can use this report to view/print/download all activities including case notes.       NOTE: Reports can also be generated from the Participant Reports page. |
| **Objective 4: Create/Manage Activity Due Reminders** | |
| **4.01 Display Activity Due - All Layout** | * From the Case Management page, change your **Selected Layout** to **Activity Due - All** and select the **Apply** link. |
| **4.02 Create New Custom Activity Due Reminder** | * Select the **New** link, above the grid. The **Custom Activity Due** page displays. |
| **4.03 Activity Field** | * In Section 1: General, enter text into the **Activity\*** field. |
| **4.04 Activity Due Date** | * In Section 1: General, enter a date in the **Due Date\*** field. * Alternately, you could enter a value in the **Days from Today** field, and this will calculate the **Due Date** for the activity. |
| **4.05 Activity Reminder Date** | * In Section 1: General, enter a date in the **Reminder Date** field. * Alternately, you could enter a value in the **Days from Due** field, and this will calculate the **Reminder Date**. |
| **4.06 Activity Comments** | * In Section 1: General, enter text in the **Comments** field. |
| **4.07 Finish To Save Custom Activity Due** | * On the main menu of the **Custom Activity Due** for participant page, select **Finish** to save and return to the **Case Management** page. |
| **4.08 View Activity Due – All Layout** | * Once you return to the **Case Management** page, change you layout to **Activity Due – All** if needed to view the Activity records grid. Your **Custom Activity Due** that you just created may be the only item or may be among several. |