

Community Mental Health Common Assessment Project (CMH CAP)

Ontario Common Assessment of Need

O CAN 2.0

Implementation Validation Guide

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OCAN Implementation Testing/Validation/Acceptance Responsibilities

Responsibilities of vendors:

Development testing (unit/integration/system testing) is the responsibility of the implementing vendor. The vendor must ensure that the implemented system meets all of the requirements as documented/communicated as part of the OCAN Software Requirements Specification package.

The Vendor is also responsible for performing system testing and data submission testing as outlined in this document directly with the project team at CCIM **and assisting the Health Service Providers in performing their systems testing and data submission testing.**

Responsibilities of HSPs:

It is the responsibility of the HSPs to review and understand the automation requirements as documented/communicated by the project team as part of the OCAN automation requirements release package.

It is the responsibility of the HSPs to test, validate and accept the delivered solution from the vendor based on the requirements communicated by the project team AS WELL AS any specific needs that HSPs have based on their technical infrastructure (hardware, software), other implemented software applications already in use by the HSP and the specific business processes, users, access, approval etc. pertaining to the HSP. **The HSP must perform data submission testing directly with the project team.**

Responsibilities of the project team:

It is the responsibility of the project team to clearly document/communicate the requirements to the vendors and the HSPs. The project team must be available to answer any and all questions regarding the requirements and make updates/clarifications to the requirements as needed based on questions/feedback from the vendors and/or HSPs.

It is the responsibility of the project team at CCIM to provide the appropriate material and environment for system testing and to support the vendors and HSPs through their test phases. The project team **IS NOT** responsible for testing, validating or approving the implemented solution delivered to the HSPs.

Purpose of this document

The purpose of this document is to capture related tasks and information around implementation testing/validation (to be completed by the vendors and community mental health HSPs)

If there are further questions/concerns regarding this document, contact the Community Mental Health Common Assessment Project (CMH CAP) team at: CMHCAP@ccim.on.ca

Audience

- Mental Health HSPs (Health Service Providers) in Ontario participating in the CMH CAP (Community Mental Health Common Assessment Project)
- Vendors Implementing an automated solution of the OCAN (Ontario Common Assessment of Need)

This document as well as supporting documents and communication will be shared with both the Mental Health HSPs as well as the vendors involved in the automation of the OCAN.

Implementation Validation Process Overview

For Vendors

Step 1 – Vendors should complete unit, integration and system testing throughout the implementation process based on the requirements documentation provided, as well as the communications and clarifications that come out of the weekly vendor teleconference calls.

Step 2 – Vendors may choose to leverage the OCAN Features Checklist, included in this document, as part of their testing process.

Step 3 – Vendors should follow the test scenarios provided in the Test Scenarios section of this document and save the assessment information in their test environment.

Step 4 – Vendors should submit their test data submission using the steps outlined in the test data submission section of this document. The project team will verify the data submission file based on XML structure, mandatory fields, lookup codes and captured assessment data and provide feedback to the vendor. The test will also include data submission specifications for submitting completed assessments to the Integrated Assessment Record (IAR) database.

Note: Vendors should not limit their testing to the above mentioned steps. These steps are a minimum set of tests and vendors should engage their quality assurance teams to thoroughly test the OCAN implementation before delivering the final product to the HSPs.

For Mental Health HSPs

One of the milestones for a successful OCAN implementation for the HSP is UAT (User Acceptance Testing). HSPs should conduct UAT so that it provides confidence to them that all key requirements that were defined by the project team have been implemented by their vendors.

If there are any concerns or errors in the system, the HSPs can then escalate them to the vendors. In addition, UAT is a good exercise for the HSPs on familiarization with the system prior to Go-Live.

The OCAN Features Checklist section of this document is a summary of OCAN automation requirements presented in a checklist format for HSPs to use during the UAT process.

The Test Scenarios section of this document outlines scenarios that highlight the critical areas of the application without getting into details and specifics around data entry. The users have the freedom to enter any data, but guidance around critical areas is provided to ensure proper testing. HSPs should not be limited to the UAT scenarios provided. Thorough system testing by the HSPs will ensure a properly working automated solution.

An important part of the UAT scenarios process includes the data submission piece. The Project Team will work closely with the HSPs to ensure that adequate data submission testing is done and that the HSPs are ready prior to Go-Live.

UAT Steps

Step 1 – HSPs should plan to do complete business and system testing of the solution delivered to them by their vendors. HSPs should refer to the OCAN System Requirements Specifications package provided to the vendors and shared with the HSPs on the CCIM website.

Step 2 – HSPs can use the OCAN Features Checklist to assist with verifying that the implemented solution meets the requirements documented by the project team.

Step 3 – Before Go-Live, the HSPs should enter mock assessment information as outlined in the OCAN Test Scenarios section of this document into their **test** OCAN automated system.

Step 4 – HSPs should consult with their vendors regarding how to complete test data submissions with the project team based on the information provided in this document. This includes completing all of the test assessment scenarios outlined and performing the steps outlined in submitting the completed assessment records to the project team and meeting the data submission requirements and specifications of the Integrated Assessment Record.

Step 5 – HSPs should complete the test data submission steps (which must not include real Consumer data and should only include mock/test assessment data) to the project team. The project team will receive the assessment test data file, ensure that the file meets the requirements for file structure, mandatory fields and format of submitted data fields and provide feedback to the HSP.

Implementation Validation Test Process

The Integrated Assessment Record will be the central data repository for OCAN information. The OCAN Implementation Validation Process involves capturing OCAN assessment information in the mental health HSP's software and submitting completed assessment records to the IAR test environment.

The test process will check for the following:

1. The automated OCAN software solution from the vendor has the ability to capture OCAN assessment information in its entirety.
2. The software adheres to the mandatory fields and valid values as outlined by the OCAN automation requirements.
3. The software has the ability to extract completed assessment data and generate the appropriate XML structure as outlined by the OCAN XML schema definition.
4. The IAR Submission Envelope is formatted correctly.
5. The IAR SOAP Envelope is formatted correctly (Web Service only).
6. All necessary Submission Header values properly configured.
7. Assessment data and IAR PHI data match correctly.
8. All of the recommended scenarios as outlined in the OCAN Test Scenarios section of this document are covered.
9. New and updated assessments are processed as expected.
10. Historical information can be produced, submitted and accepted in IAR.
11. Error conditions are handled by vendor software.

Vendors:

How to obtain access to the IAR Test Environment

Prior to any test submission, a specific vendor account must be setup within the IAR Test Environment. IAR will issue a unique ID and application identifier to each vendor to be used for all test purposes.

An account will be made available by an email request to iar@ccim.on.ca with a subject line of "IAR Technical – Request Vendor Test System Access".

Vendor Tests Required

There are 2 types of test data submissions:

1. Web Service Submissions
2. Manual File Upload

In order for a vendor system to be deemed compliant using either method, the test steps listed for that category must be completed. The same set of assessment data, based on the OCAN Test Scenarios, can be used for both test categories.

Important:

The CCIM Validation Environment is provided by CCIM for testing and validation purposes only. The Validation Environment is a developing environment that does not and cannot provide necessary controls to safeguard PHI. In case of an accidental upload of PHI to the Validation Environment please immediately notify CCIM at **1-800-909-5600 – Option 8** to remove the uploaded PHI to minimize the risk of unauthorized PHI disclosure.

*****Note:** As a part of CCIM's Privacy and Security Requirements, all assessment data will be removed from the IAR Test Environment on the 1st day of every month. Please ensure that test submissions and requests for validation are completed between the start and end of every month allowing CCIM enough time to process the validation requests, otherwise data will be lost and your organization will be required to re-submit to the IAR. Please account for the weekend days, as CCIM does not process validation requests on weekends.

Vendor Manual / Web Service Test Assessment Uploads

Please refer to the **IAR Validation Environment Guide on the CCIM website: www.ccim.on.ca** for additional information regarding testing.

Step 1 - Single Assessment using same Assessment ID

Test Type	OCAN 2	OCAN 1
Add New	pass/fail	pass/fail
Update	pass/fail	pass/fail

For this step, the vendor is expected to send a test completed assessment, and then to submit the same assessment (same assessment ID) with a minor difference in one of the fields to attempt an "update" in the IAR database. The IAR database will keep a record of both submitted assessments but will track that the latter one was an update of the earlier submission.

Step 2 – Multiple Assessments per upload

Test Type	OCAN 2	OCAN 1
Add New	pass/fail	pass/fail

In this step, the vendor is expected to attempt a number of upload attempts each containing multiple assessments of the same OCAN type (i.e. one upload containing only Full OCANS, one upload containing Core + Self OCANS and yet another upload containing Core OCANS), since the IAR data repository does not accept different types of OCAN in the same upload attempt. The assessment scenarios used here should again reflect all of the recommended OCAN Test Scenarios presented in this document.

Step 4 – Historical Assessments

Test Type	OCAN 1.0 or 2.1
Add New	pass/fail

1 message of 2 or more assessments of the same version – any valid type combination – one message for each historical version.

Mental Health HSPs – Test Submission Process - OCAN 2.0

IAR Validation Environment – HSP Instructions for Manual and Web Service Submissions

This information is regarding access to the IAR validation environment for HSPs to complete implementation validation testing.

- **Note:** You must first complete the test scenarios included in this Guide and record the Assessment IDs generated by your source test software.

Important:

The CCIM Validation Environment is provided by CCIM for testing and validation purposes only. The Validation Environment is a developing environment that does not and cannot provide necessary controls to safeguard PHI. In case of an accidental upload of PHI to the Validation Environment please immediately notify CCIM at **1-800-909-5600 – Option 8** to remove the uploaded PHI to minimize the risk of unauthorized PHI disclosure.

*****Note:** As a part of CCIM’s Privacy and Security Requirements, all assessment data will be removed from the IAR Test Environment on the 1st day of every month. Please ensure that test submissions and requests for validation are completed between the start and end of every month allowing CCIM enough time to process the validation requests, otherwise data will be lost and your organization will be required to re-submit to the IAR. Please account for the weekend days, as CCIM does not process validation requests on weekends.

- When generating names for mock clients it is important to use names unique enough to search easily. The following site is one of many that can generate random names for testing: <http://www.kleimo.com/random/name.cfm>

Please avoid using names such as 'Test Client,' 'Consumer A' etc.

Web Service Configuration:

You will need to configure your source test software environment to submit automatically to the IAR validation environment. You may want to confirm with your vendor as this may already be set up. If it is not, and you require assistance to configure your source test software environment, please contact your vendor. Please also ensure that your vendor provides instructions for completing a web service submission.

Configuration Details:

- To configure web service submissions in your source test software, the submission url is: <https://iarintest.ccim.on.ca/iar/services/SubmissionService>
- Configure your source test software with the user ID: **Contact CCIM or your vendor to obtain the user ID**
- Configure your source test software with the password: **Contact CCIM or your vendor to obtain the password**

Web Service Submission Verification:

1. Once you have completed your web submission, sign into the IAR validation environment (with the same username and password as above) to review the status of your submission via this link:
<https://iarvt.ccim.on.ca/concerto/Concerto.htm>. This is a direct link to the IAR validation environment.
2. Enter the first and last name of your mock client in the appropriate search boxes
3. Click on 'Search' and ensure that you are able to find your mock client and associated assessment scenarios
4. If you have successfully found your mock client and associated assessment scenarios, please request validation of your test submission by e-mailing CCIM at: iar@ccim.on.ca. Subject Line: Request for Validation
5. Please provide the following in your request:
 - a. Mock client's first and last name used in the submission
 - b. Transaction IDs
 - c. Date
 - d. Assessment IDs (generated by your source test software)

Manual Upload Testing:

Manual Uploads:

1. Open your internet browser and go to the following link:
<https://iarvt.ccim.on.ca/concerto/Concerto.htm>. This is a direct link to the IAR validation environment.
2. Use the user ID: **Contact CCIM or your vendor to obtain the user ID**
3. Use the password: **Contact CCIM or your vendor to obtain the password**
4. The Menu Bar on the left hand side of the IAR window is the primary navigation method. Click on 'Submissions'
5. Click on 'Upload'

IAR Submission Uploader

Upload File

6. The above screen will appear
7. Click on 'Browse' and choose the submission file you wish to upload
8. Once the file appears in the window, click 'Upload'
9. Return to the Menu Bar, select 'Person Search'
6. Enter the first and last name of your mock client in the appropriate search boxes
7. Click on 'Search' and ensure that you are able to find your mock client and associated assessment scenarios
8. If you have successfully found your mock client and associated assessment scenarios, please request validation of your test submission by e-mailing CCIM at: iar@ccim.on.ca. Subject Line: Request for Validation
9. Please provide the following in your request:

- a. Mock client's first and last name used in the submission
- b. Transaction IDs
- c. Date
- d. Assessment IDs (generated by your source test software)

If you have any questions regarding these instructions, please contact us via the Support Centre: 1-866-909-5600 option 8 or e-mail: iar@ccim.on.ca.

OCAN Test Scenarios

The following scenarios are to be used when a vendor or an HSP wants to test their automated OCAN solution by entering test scenarios that cover a variety of OCAN assessments, and when completed the assessments are submitted to the project team for validation. The validation by the project team will verify assessment business scenarios as well as the structure of the data submission file along with mandatory fields and valid values.

For the following scenarios the person entering the test assessments can choose to enter any value for the fields in the assessment unless otherwise stated by the test scenario.

Important: Please remember that the information entered to complete the test scenarios below should not be real information pertaining to a Consumer or any other person. The information entered including first name, last name etc. as well as answers to all other questions in the assessment should be fake information.

Helpful Hint: When generating names for mock clients **it is important to use names unique enough to search easily**. The following site is one of many that can generate random names for testing: <http://www.kleimo.com/random/name.cfm> Please avoid using names such as 'Test Client, 'Consumer A' etc.

Scenario 1 – Create an Initial CORE OCAN

Purpose: The purpose of this scenario is to create a new Initial CORE OCAN for a new Consumer (this consumer will be referred to as "Consumer A"). An Initial OCAN is conducted when the Consumer first enters the Mental Health System or when returning more than 3 months after a (Prior to) Discharge Assessment:

Select to complete a new Initial CORE OCAN and complete all mandatory fields with whatever values you wish to use unless otherwise stated by the steps below.

1. **Select 'Initial OCAN' as Reason for OCAN**
2. **Enter a Start Date and Completion Date (MM-DD-YYYY) which is more than 30 days apart** - a warning message may be displayed when Completion Date is greater than 30 days from Start Date but this should not prevent you from completing and saving the OCAN.
3. **Date of Birth (MM-DD-YYYY) – do not enter a specific date in this mandatory field** - select 'Unknown' option instead
4. **Mental Health Functional Centre** - enter at least 5 centres, but only 1 will have option 'Yes' for OCAN Lead
5. **Family Doctor Information – select 'Yes' option and enter all contact info required** – name, full address, phone#, ext, email address
6. **Psychiatrist Information – select 'No' option and enter all contact info required** – name, full address, phone#, ext, email address
7. **Other Contact – select 'Consumer declined to answer' option** – name, full address, phone#, ext, email address
8. **Other Agency – select 'Yes' option and enter all contact info for 1 agency only** – name, full address, phone#, ext, email address
9. **Complete all mandatory and optional fields**

Scenario 2 – Create a CORE + SELF OCAN at 6 Months

Purpose: The purpose of this scenario is to create a CORE + SELF OCAN at 6 Months for the same "Consumer A". Reassessments can only be created for Consumers who have an IA completed 6 months prior or they've been receiving services from the HSP for a number of months/years already (not new to the HSP):

1. **Enter Start Date and Completion Date (MM-DD-YYYY) for the Consumer part** – use the same start and complete dates for both parts: consumer and staff
2. **Complete all fields for Consumer part** – use all Need ratings available, including the 'I don't want to Answer' response
3. **Select 'Reassessment' as Reason for OCAN**
4. **Complete all mandatory fields but leave out all optional fields for Staff part** – OCAN is completed and saved
5. **Mental Health Functional Centre** – enter only 1 centre with option 'Yes' for OCAN Lead
6. **Family Doctor Information – do not select any available option just enter all contact info required** – name, full address, phone#, ext, email address
7. **Psychiatrist Information – select 'None available' option**
8. **Other Contact – select 'Yes' option and enter all info required for 2 different contacts** – name, full address, phone#, ext, email address
9. **Other Agency – select 'Unknown' option**

Scenario 3 – Create FULL OCAN with Reason for OCAN 'Other'

Purpose: The purpose of this scenario is to create an OCAN for reason 'Other (e.g., consumer request)' for the same "Consumer A" that had an OCAN at 6 months previously completed. This type of OCAN is completed under special circumstances such as a consumer request.

1. **Start Date (MM-DD-YYYY) is only 2 months after Start Date for Scenario 2** – complete and save the OCAN
2. **All fields for Consumer part have any response except 'I don't want to answer' option**
3. **Select 'Other (e.g., consumer request)' as Reason for OCAN**
4. **Complete all mandatory and all optional fields for Staff part** – OCAN can be completed and saved
5. **Family Doctor Information – select 'Unknown' option** – do not enter any other contact information
6. **Psychiatrist Information – select 'Unknown' option** – do not enter any other contact information
7. **Other Contact – select 'Unknown' option** – do not enter any other contact information
8. **Other Agency – select 'Unknown' option** – do not enter any other contact information
9. **'Summary of Actions'** – is automatically populated based on the entries at the domains level, prioritize actions other than the domain order

Scenario 4 – Create a Significant change FULL OCAN

Purpose: The purpose of this scenario is to create an OCAN with 'Significant Change' reason for the same "Consumer A". This type of OCAN is conducted in between the 6 month cycle if there is a significant change in the overall needs of the consumer:

1. **Start Date (MM-DD-YYYY) is less than 6 months from last OCAN (Scenario 3)** – the OCAN is completed less than 6 months from the Start Date used for scenario 3
2. **Complete all fields for Consumer part – use 'I don't want to Answer' response for all fields**
3. **Select 'Significant Change' as Reason for OCAN**
4. **Complete only the mandatory fields for Staff part** – OCAN can be completed and saved
5. **Family Doctor Information – select 'None available' option**
6. **Psychiatrist Information – select 'Unknown' option**
7. **Other Contact – select 'Yes' option and enter all info required for 3 different contacts** – name, full address, phone#, ext, email address
8. **Other Agency – select 'Yes' option and enter all info required for 3 different contacts** – name, full address, phone#, ext, email address
9. **'Summary of Referrals' add 1 row and delete 1 row** – this table is pre-populated based on the OCAN completed at Scenario 3; delete 1 existing row and replace it with something totally different

Scenario 5 – Create a FULL OCAN (Prior to) Discharge

Purpose: The purpose of this scenario is to create an OCAN at Discharge for the same "Consumer A" that had an OCAN at 6 months previously completed. The OCAN can be completed with or without the Consumer being present:

1. **There will be no Consumer part completed** – use 'No' response to the question 'Was Consumer Self-Assessment Completed?' in the Staff assessment
2. **Select '(Prior to) Discharge' as Reason for OCAN**
3. **Complete all mandatory fields with 'Unknown' response for Staff assessment** – all 24 domains will have 'Unknown' response, no optional fields are entered
4. **Do not make any selection or entry to Family Doctor Information, Psychiatrist Information, Other Contact and Other Agency fields**
5. **Leave 'Summary of Referrals' unchanged from previous OCAN** – this table is pre-populated based on the OCAN completed previously

Scenario 6 – Create 1 OCAN with reason 'Review' and 1 OCAN with reason 'Re-key'

Purpose: The purpose of this scenario is to create an OCAN for reason 'Review' and 1 OCAN for reason 'Re-key' for the same "Consumer A"; both these types of OCAN are not included in the XML file

1. **'OCAN completed by OCAN Lead?' will have 'No' response** – create both at the same time as all the others for previous scenarios and generate the XML file; these 2 should not be included in the XML file

Features Checklist

REMINDER: Actual results answers should always be YES. Alert your vendor if any answer is NO.

Steps	Description	Expected Results	Actual Results
1.	Enter correct username and password to login	User is logged in	Are you logged in? YES <input type="checkbox"/> NO <input type="checkbox"/>
2.	Enter an incorrect username or password	An error message is displayed	Is an error message displayed? YES <input type="checkbox"/> NO <input type="checkbox"/>
3.	Login using correct credentials	User has access to all OCAN types	Do you have access to all OCAN types? YES <input type="checkbox"/> NO <input type="checkbox"/>
4.	Select 'No' to 'OCAN completed by OCAN Lead?' question	Only 'Review' and 'Re-key' OCAN types are available to user	Do you have access only to 'Review' and 'Re-key' OCAN types? YES <input type="checkbox"/> NO <input type="checkbox"/> Are all other OCAN types unavailable? YES <input type="checkbox"/> NO <input type="checkbox"/>
5.	Start a new Consumer Assessment	Consumer has access to his/her Assessment only, no other clients or other sections of the application; new Assessment is created	Can you create an assessment for a new consumer? YES <input type="checkbox"/> NO <input type="checkbox"/> Does the consumer have access to his/her own Assessment only? YES <input type="checkbox"/> NO <input type="checkbox"/>
6.	Start a new Staff Assessment for the same Consumer and enter data for mandatory fields only	A new Assessment is created and status changes to 'In Progress'	Can you create a new Staff Assessment? YES <input type="checkbox"/> NO <input type="checkbox"/> Is the status changed to 'In Progress'? YES <input type="checkbox"/> NO <input type="checkbox"/> Is the Staff Assessment linked to the Consumer Assessment? YES <input type="checkbox"/> NO <input type="checkbox"/>
7.	Change OCAN status to 'Completed' without completing all the mandatory fields and save it	An error message is displayed and status cannot be changed until all the mandatory fields are completed	Are you blocked from changing the status? YES <input type="checkbox"/> NO <input type="checkbox"/> Is an error message displayed? YES <input type="checkbox"/> NO <input type="checkbox"/>
8.	Perform a search for a specific Consumer or Assessment ID	Both consumer and staff Assessments have a unique ID associated with them	Is there 1 OCAN with both Consumer and Staff parts displayed? YES <input type="checkbox"/> NO <input type="checkbox"/>

9.	Enter required data in the OCAN; use some 'Unknown' and 'Consumer declined to answer' responses for some of the mandatory fields	Data can be entered in sequence or randomly; start date is not system generated, has to be entered manually, and while status is 'In Progress' Assessment can be saved at any time	<p>Can you fill up mandatory fields randomly? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>Is start date field empty? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>Can you enter OCAN start date? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>Can you save the OCAN at any time? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>Is the status 'In Progress'? YES <input type="checkbox"/> NO <input type="checkbox"/></p>
10.	Create an OCAN for a new consumer	Only an Initial OCAN can be created	<p>Is this an Initial OCAN? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>Are you prevented from making a different selection? YES <input type="checkbox"/> NO <input type="checkbox"/></p>
11.	Create an OCAN for a consumer that was discharged for more than 3 months and had an OCAN at discharge	Only an Initial OCAN can be created	<p>Is this an Initial OCAN? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>Are you prevented from making a different selection? YES <input type="checkbox"/> NO <input type="checkbox"/></p>
12.	Select Initial OCAN for a consumer already in the system	An Initial OCAN cannot be created	<p>Are you prevented from selecting an Initial OCAN? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>Can you select any other OCAN type? YES <input type="checkbox"/> NO <input type="checkbox"/></p>
13.	Open any new OCAN type and print it	User has easy access to a PDF version of: CORE, CORE + SELF and FULL OCAN	<p>Do you have easy access to a PDF version of any OCAN type? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>Can you print the PDF version? YES <input type="checkbox"/> NO <input type="checkbox"/></p>
14.	Complete both parts of the OCAN concurrently	Both parts can be completed concurrently by the Consumer and OCAN Lead	Can you complete both OCAN parts concurrently? YES <input type="checkbox"/> NO <input type="checkbox"/>
15.	Complete Consumer part before the staff	Consumer part can be completed before staff	Can you complete Consumer part first? YES <input type="checkbox"/> NO <input type="checkbox"/>
16.	Compare any of the printouts to the OCAN in the system	The OCAN should include all the questions defined by the OCAN	Is the printed OCAN similar to the automated one? YES <input type="checkbox"/> NO <input type="checkbox"/>
17.	Change OCAN status to 'Cancelled' after completing some of the mandatory and optional fields	OCAN status changes to 'Cancelled'	<p>Can you change the status? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>Is the status changed to 'Cancelled'? YES <input type="checkbox"/> NO <input type="checkbox"/></p>

18.	Enter a completion date that is more than 30 days from start date (e.g. Jan 5 – Feb 24)	A warning message is displayed when completion date is greater than 30 days from start date but won't prevent user from completing the OCAN	Is a warning message displayed? YES <input type="checkbox"/> NO <input type="checkbox"/> Can you change status to 'Completed' and save the OCAN? YES <input type="checkbox"/> NO <input type="checkbox"/>
19.	Enter a completion date that is less than 30 days from start date (e.g. Feb 2 – Feb 20)	The date is accepted as completion date	Is this date accepted as completion date? YES <input type="checkbox"/> NO <input type="checkbox"/> Can you change status to 'Completed' and save the OCAN? YES <input type="checkbox"/> NO <input type="checkbox"/>
20.	Complete a staff part but leave Consumer part partially completed and change status to 'Completed'	Consumer part is optional, user can change OCAN status to 'Completed'	Can you change OCAN status to 'Completed' when Consumer part is incomplete? YES <input type="checkbox"/> NO <input type="checkbox"/>
21.	Complete all the mandatory fields and all optional fields, save the OCAN and change status to 'Completed'	OCAN is complete, 'Summary of actions' table is populated with all the actions recorded at the end of each domain (optional field) along with the domain name	Is status changed to 'Completed'? YES <input type="checkbox"/> NO <input type="checkbox"/> Is 'Summary of actions' table populated? YES <input type="checkbox"/> NO <input type="checkbox"/>
22.	Prioritize the domains and their actions in the 'Summary of actions' table by assigning a number from 1 to 24	Prioritization starts from 1 to 24 and system won't allow user to skip	Can you only start with priority #1? YES <input type="checkbox"/> NO <input type="checkbox"/> Can you enter the numbers in sequence without skipping any? YES <input type="checkbox"/> NO <input type="checkbox"/> Are you getting an error if you start from a number other than 1? YES <input type="checkbox"/> NO <input type="checkbox"/> Are you getting an error if you skip a number? YES <input type="checkbox"/> NO <input type="checkbox"/>
23.	Complete an OCAN with 'Prior to discharge' reason	The OCAN at discharge can be done only for an existing consumer	Can you complete an Assessment at discharge for an existing consumer? YES <input type="checkbox"/> NO <input type="checkbox"/> Are you blocked from completing an Assessment at discharge for a new consumer? YES <input type="checkbox"/> NO <input type="checkbox"/>

24.	Print any version of OCAN while status is 'In Progress' or 'Completed'	All data entered by the user is printed, front page/title and introduction page are included, Client ID and Assessment ID are printed on top of each page, Footer/Legend for Need Rating are available as per PDF, order and bolding of fields resemble PDF, fields belong to right sections, Headings and Domains are prominent and all sections are properly divided	<p>Is all data entered by the user printed? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <hr/> <p>Are front page/title and introduction page included? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <hr/> <p>Are Client ID and Assessment ID printed on top of each page? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <hr/> <p>Is Footer/Legend for Need Rating available as per PDF? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <hr/> <p>Do order and bolding of fields resemble PDF? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <hr/> <p>Do fields belong to right sections as per PDF? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <hr/> <p>Are Headings and Domains prominent and all sections properly divided? YES <input type="checkbox"/> NO <input type="checkbox"/></p>
25.	'Summary of Referrals' table	If this is not an Initial OCAN, the 'Summary of Referrals' table is pre-populated with data captured in the previous OCAN for this Consumer, and user can change it if required	<p>Is the 'Summary of Referrals' table pre-populated? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <hr/> <p>Can you change any of the pre-populated data? YES <input type="checkbox"/> NO <input type="checkbox"/></p>
26.	Check 'No' as answer to the question: 'Was Consumer Self-Assessment Completed?'	All consumer ratings should be blank	<p>If 'No' is selected, are all consumer ratings blank? YES <input type="checkbox"/> NO <input type="checkbox"/></p>
27.	Complete multiple Service Records in the CMH Service Use section	Only 1 Service Record can have 'OCAN Lead' answered 'Yes'	<p>Can you check 'Yes' as the answer for 1 Service Record? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <hr/> <p>Will system prevent you from answering 'Yes' to more than 1 Service Record? YES <input type="checkbox"/> NO <input type="checkbox"/></p> <hr/> <p>Is an error message displayed? YES <input type="checkbox"/> NO <input type="checkbox"/></p>

28.	Complete an OCAN but leave 'Date of Birth' field blank and change status to 'Completed'	Cannot change status to 'Completed' with no entry for 'Date of Birth'; this a mandatory field, if no entry then 'Unknown' must be checked	Will system prevent you from changing status to 'Completed' when 'Date of Birth' is blank? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Is an error message displayed? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Once 'Unknown' is checked can you change status to 'Completed'? YES <input type="checkbox"/> NO <input type="checkbox"/>
29.	Save and change status to 'Completed' then try to make a change to the OCAN	System restricts user from making any changes to a 'Completed' OCAN	Will system prevent you from making changes to a 'Completed' OCAN? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Is an error message displayed? YES <input type="checkbox"/> NO <input type="checkbox"/>
30.	Ensure that there is at least 1 consumer that has 6 months passed from the last OCAN completed	System would alert the OCAN lead when the 'OCAN at 6 Months' should be conducted	Will system alert the OCAN lead when the 'OCAN at 6 Months' should be conducted? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Is there a message displayed? YES <input type="checkbox"/> NO <input type="checkbox"/>
31.	Search and view staff and consumer OCAN in 'In Progress' status	Consumer and staff assessments in 'In Progress' status can be viewed either together or separately	Can you view staff Assessment? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Can you view consumer Assessment? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Can you view them together? YES <input type="checkbox"/> NO <input type="checkbox"/>
32.	Search and view staff and consumer OCAN in 'Completed' status	Consumer and staff assessments in 'Completed' status can be viewed either together or separately	Can you view staff Assessment? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Can you view consumer Assessment? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Can you view them separately? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Can you view them together? YES <input type="checkbox"/> NO <input type="checkbox"/>
33.	Perform a search for a specific consumer	All OCANS displayed are associated with the same consumer and all have a unique ID	Can you search OCANS for a specific consumer? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Is a unique ID assigned to the consumer? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Are all OCANS displayed for the selected consumer? YES <input type="checkbox"/> NO <input type="checkbox"/>
			Do they all have a unique ID? YES <input type="checkbox"/> NO <input type="checkbox"/>