EMR File Testing Scenarios

The file testing scenarios:

- Should help guide your file upload testing process and help you understand file errors, warnings, and how to troubleshoot them.
- Should be completed in the File Testing & Certification Environment (FTC).
- Can be completed in any order but are provided in a suggested sequence.
- Should be tracked as you complete each scenario by recording the link (or URL) of the **Import EHR File** task**.**

Test Scenarios by Entity Combination

Use the list below to locate the Test Scenarios that are applicable to your organization or agency.

My organization is uploading:

All Entities (Referral, Insurance, Intake, Eligibility Determination, IFSP, Contact Notes, Transition, and Discharge)

Type	Test Scenarios
Singular updates to existing child record	1. Successfully send a new child record and referral. ***Expected result:*** *If the child's address falls within your Local System, a TRAC-IT ID will be generated and shared in the Response file that you should store in your EHR. If the referral is for a child outside of your Local System, the Review Referral task will be created for the other Local System, and you will not receive a TRAC-IT ID. A referral sent for a child who has already been enrolled in Early Intervention in the last six months and was not found ineligible will result in a re-enrollment warning message in the Response file. A TRAC-IT ID will still be generated for this new enrollment.*
	2. Using an existing enrollment where enrollment status is "Referred - No Services", successfully upload an Intake to the record ***Expected result:*** *The intake is added to the child's enrollment and the enrollment case is updated to include appropriate tasks. The Enrollment Status should be set to "Referred - Services".*
	3. Using an existing enrollment, successfully upload insurance information. ***Expected result:*** *Insurance is added to the child's enrollment.*
	4. Using an existing enrollment where enrollment status is "Referred - Services" and there is an intake on the record, successfully upload an ELIGIBLE Eligibility Determination, along with the appropriate Consents. ***Expected result:*** *The Consents and Eligibility Determination are added to the child's enrollment, and the enrollment case is updated to include appropriate tasks. The Enrollment Status should be set to "Eligible, No IFSP". The Eligible Through Date on the case page header should populate.*
	5. Using an existing enrollment where enrollment status is "Referred - Services" and there is an intake on the record, successfully upload an INELIGIBLE Eligibility Determination, along with the appropriate Consents. ***Expected result:*** *The Consents and ineligible Eligibility Determination are added to the child's enrollment, and the enrollment case is updated to include appropriate tasks for discharge. The Enrollment Status should be set to "Ineligible".*
	6. Using an existing enrollment where enrollment status is "Eligible, No IFSP", successfully upload an IFSP (assessment, service plan, outcomes, goals, attendees included), as well as the appropriate Consents. ***Expected result:*** *The Consents and IFSP are added to the child's enrollment, and the enrollment case is updated to include the appropriate tasks. The Enrollment Status should be set to "IFSP".*

	7. Using an existing enrollment where the enrollment status is "IFSP" or "Services", successfully upload an IFSP Review to the record. ***Expected result:*** *The IFSP record on the enrollment is updated with the IFSP Review information (review date, any changes to service plans, outcomes and goals).*
	8. Using an existing enrollment where the enrollment status is "IFSP" or "Services", successfully upload an Annual IFSP to the record. ***Expected result:*** *The Annual IFSP is added as the most recent IFSP on the child's record.*
	9. Using an existing enrollment, successfully upload a Progress Note/Service Log to the record. ***Expected result:*** *The Contact Note is created in the child's record. The Progress Note ID and Service Log ID are shared in the Response file. If enrollment status was "IFSP," it should update to "Services".*
	10. Successfully update the above created Contact Note (Progress Note/Service Log) using the Progress Note ID and Service Log ID. ***Expected result:*** *The Contact Note is updated in the child's record with the changes.*
	11. Using an existing enrollment, successfully upload the Transition Plan to the record. ***Expected result:*** *The Transition Plan is added to the child's enrollment, and the enrollment case is updated to include the discharge task. If partial Transition Information is included, then the Transition tasks will be created.*
	12. Successfully discharge a child by uploading discharge information to an enrollment. **Note: It is recommended to test sending discharge information for multiple cases that are at different points in the Early Intervention process.* ***Expected result:*** *The discharge date and reason are added to the enrollment and the case is closed if the date is before today.*
	13. Optional: Successfully upload a communication log to the child's record. **Note: The communication log is commonly used to document visit cancelations or other non-billable correspondence by clinical providers.* ***Expected result:*** *The communication log is created in the child's record.*

<table>
<tr><td>Multiple updates to a child record</td><td>14. Successfully update multiple entities on a single enrollment at once.
➢ Find or upload a recent referral and record the TRAC-IT ID in your EHR.
➢ Upload Intake, Eligibility Determination, Insurance, IFSP, and Contact Notes as part of one file.

*Reminder: If any of the Attendees at Intake, Eligibility Determination, or IFSP are contracted providers, you will need to use the “Add Provider” task on the enrollment before you can upload these entities to ensure that the contracted provider has access to the enrollment.

Expected result: All entities are added to the enrollment. The Eligible Through Date, Next Annual IFSP Date, Next IFSP Review Date, and IFSP Team in the case page header should update accordingly. The Enrollment status should update to “IFSP”. The tasks available should be Transition tasks.</td></tr>
<tr><td rowspan="2">Updates to multiple child records</td><td>15. Successfully update multiple existing enrollments at once by sending data for two or more cases in one file.

Expected result: Both enrollments are updated with the information included in the file.</td></tr>
<tr><td>16. Successfully upload two or more referrals at once to create multiple new enrollments.

Expected result: Multiple enrollments are created, and multiple enrollment numbers will be shared in the Response file to be stored in your EHR; verify there are no duplicates. If any of the referrals are for a child outside of your Local System, the Review Referral task will be created for the other Local System, and you will not receive a TRAC-IT ID. A referral sent for a child who has already been enrolled in Early Intervention in the last six months and was not found ineligible will result in a re-enrollment warning message in the Response file. A TRAC-IT ID will still be generated for this new enrollment.</td></tr>
</table>

Only Contact Notes

Type	Test Scenarios
Singular record updates	1. Using an existing enrollment, successfully upload a Progress Note/Service Log to the record. ***Expected result:*** *The Contact Note is created in the child's record. The Progress Note ID and Service Log ID are shared in the Response file. If enrollment status was "IFSP", it should update to "Services".*
	2. Successfully update the above created Contact Note (Progress Note/Service Log) using the Progress Note ID and Service Log ID. ***Expected result:*** *The Contact Note is updated in the child's record with the changes.*
	3. Optional: Successfully upload a communication log to the child's record. **Note: The communication log is commonly used to document visit cancelations or other non-billable correspondence by clinical providers.* ***Expected result:*** *The communication log is created in the child's record.*
Multiple updates to a child record	4. Successfully upload multiple Contact Notes to a single enrollment at once. ***Expected result:*** *All Contact Notes are added to the enrollment case; verify there are no duplicates.*
Updates to multiple child records	5. Successfully update multiple enrollments at once by sending Contact Notes for two or more cases in one file. ***Expected result:*** *Respective Contact Notes are added to both enrollments; verify there are no duplicates.*

Referrals and Contact Notes

Type	Test Scenarios
Singular record updates	1. Successfully send a new child record and referral. ***Expected result:*** *If the child's address falls within your Local System, a TRAC-IT ID will be generated and shared in the Response file that you should store in your EHR. If the referral is for a child outside of your Local System, the Review Referral task will be created for the other Local System, and you will not receive a TRAC-IT ID. A referral sent for a child who has already been enrolled in Early Intervention in the last six months and was not found ineligible will result in a re-enrollment warning message in the Response file. A TRAC-IT ID will still be generated for this new enrollment.*
	2. Using an existing enrollment, successfully upload a Progress Note/Service Log to the record. ***Expected result:*** *The Contact Note is created in the child's record. The Progress Note ID and Service Log ID are shared in the Response file. If enrollment status was "IFSP", it should update to "Services".*
	3. Successfully update the above created Contact Note (Progress Note/Service Log) using the Progress Note ID and Service Log ID. ***Expected result:*** *The Contact Note is updated in the child's record with the changes.*
	4. Optional: Successfully upload a communication log to the child's record. **Note: The communication log is commonly used to document visit cancelations or other non-billable correspondence by clinical providers.* ***Expected result:*** *The communication log is created in the child's record.*
Multiple updates to a child record	5. Successfully upload multiple Contact Notes to a single enrollment at once. ***Expected result:*** *All Contact Notes are added to the enrollment case; verify there are no duplicates.*
Updates to multiple child records	6. Successfully update multiple enrollments at once by sending Contact Notes for two or more cases in one file. ***Expected result:*** *Respective Contact Notes are added to both enrollments; verify there are no duplicates.*
	7. Successfully upload two or more referrals at once to create multiple new enrollments. ***Expected result:*** *Multiple enrollments are created, and multiple enrollment numbers will be shared in the Response file to be stored in your EHR; verify there are no duplicates. If any of the referrals are for a child outside of your Local System, the Review Referral task will be created for the other Local System, and you will not receive a TRAC-IT ID. A referral sent for a child who has already been enrolled in Early Intervention in the last six months and was not found ineligible will result in a re-enrollment warning message in the Response file. A TRAC-IT ID will still be generated for this new enrollment.*

Discharge Information and Contact Notes

Type	Test Scenarios
Singular record updates	1. Using an existing enrollment, successfully upload a Progress Note/Service Log to the record. ***Expected result:*** *The Contact Note is created in the child's record. The Progress Note ID and Service Log ID are shared in the Response file. If enrollment status was "IFSP", it should update to "Services".*
	2. Successfully update the above created Contact Note (Progress Note/Service Log) using the Progress Note ID and Service Log ID. ***Expected result:*** *The Contact Note is updated in the child's record with the changes.*
	3. Successfully discharge a child by uploading discharge information to an enrollment. **Note: It is recommended to test sending discharge information for multiple cases that are at different points in the Early Intervention process.* ***Expected result:*** *The discharge date and reason are added to the enrollment and the case is closed if the date is before today.*
	4. Optional: Successfully upload a communication log to the child's record. **Note: The communication log is commonly used to document visit cancelations or other non-billable correspondence by clinical providers.* ***Expected result:*** *The communication log is created in the child's record.*
Multiple updates to a child record	5. Successfully upload multiple Contact Notes to a single enrollment at once. ***Expected result:*** *All Contact Notes are added to the enrollment case; verify there are no duplicates.*
Updates to multiple child records	6. Successfully update multiple enrollments at once by sending Contact Notes for two or more enrollment cases in one file. ***Expected result:*** *Respective Contact Notes are added to both enrollments; verify there are no duplicates.*
	7. Successfully discharge multiple enrollments at once by sending Discharge information for two or more enrollment cases in one file. ***Expected result:*** *For each enrollment, the discharge date and reason are added to the enrollment and the case is closed if the date is before today.*