# Test Health Exchange Dashboard (HED) Portal

November 2009 Document version 1.0

© 2009 Compuware Corporation All Rights Reserved Confidential and Proprietary

#### **Table Of Contents**

Before Using Test Health Exchange Dashboard (HED) Portal	1
About the Test HED Portal	3
Workflow for Using Test HED Portal	5
List Test Case Tab	7
Add/Edit Test Case Tab	9
Test Log Tab	.11
Create New Test Case	.13
Initiate a Test Case	.15
Delete a Test Case Response	
Download a Response Document	.19
Edit a Response Document	.21
How to Edit Test Case Values	.23

## Before Using Test Health Exchange Dashboard (HED) Portal

The following items are required before using Test HED Portal:

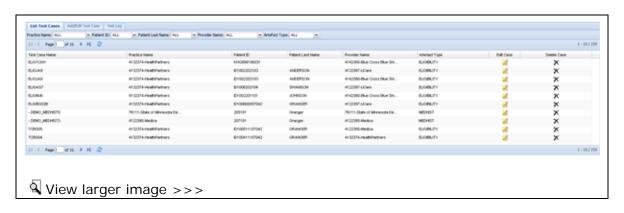
- you have prerequisite knowledge of messaging; understanding sent and received payload information
- you have been granted access to Test HED Portal
- you have the appropriate datasets in order to create/edit test cases
- you have identified the custom artifact request and response format of the targeted SP to be simulated by Test HED Portal
- Covisint has completed the backend setup with your Service Providers (SPs)
- a Test HED Portal instance has been established

## **About the Test HED Portal**

Test HED Portal (Test HED) is a custom application used to validate connections between Service Providers (SPs) and the associated Health Exchange Dashboard (HED) portlets on the portal. It consists of an administrative portlet which enables users to define key combinations to create test cases, and to submit test artifact datasets which simulate PHI artifacts coming from certain (SPs) which are then displayed in the appropriate HED portlet.

The integrated multi-application setup includes:

- Test HED Portal instance
- Record Locator Service (RLS)
- Master Patient Index Service (MPI),
- Covisint Connection Administration (CCA)
- Covisint Connect Messaging Hub (Connect).



## Workflow for Using Test HED Portal

A tester should have a prior knowledge of the custom artifact request and response format of the targeted SP to be simulated by Test HED Portal .

- create a valid response document with the expected results (outside of Test HED Portal system)
- **create a test case**, upload the response document, and provide a set of keys be to make it possible to match the response with the artifact request. These keys include:
  - o practice ID (usually a TP\_ID number for the practice generated in Connect while patient sync setup is performed),
  - o patient ID (something known to the MPI),
  - o destination service provider ID (pre-configured in Connect)
  - o artifact type (pre-configured in Test HED Portal)
  - o It is possible to use two additional keys for the eligibility checks and claim statuses in the absence of the member patient ID first and last name of the patient.
- open the HED search portlet

The selected artifact portlet will call RLS. The RLS will:

- create the canonical artifact request document
- $\bullet$  lookup the predefined list of SPs for the simulated practice or healthcare community
- distribute the artifact request to the listed simulated SPs by calling Connect synchronous processing engine.

#### The Covisint Connect application will:

- forward the canonical artifact request to the special synchronous application channel that simulates the SPs.
- Test HED application channel responder parses the canonical artifact request
- retrieves all required keys (see above)
- tries to match them against the existing database records with the configured test cases.

If the test case is found, the preconfigured artifact response will be returned back to Connect engine and later to RLS.

If the test case is not found in the Test HED database, the error response will be created for RLS and error entry will show up in the Test HED responder log.

#### The RLS will:

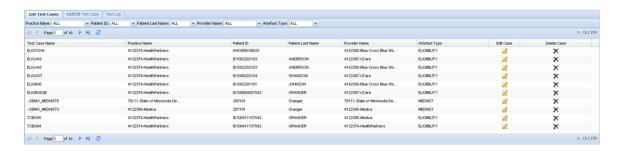
• consolidate all of the received responses into a one composite response

Test Health Exchange Dashboard (HED) Portal

• return it back to the appropriate HED portlet.

The portlet will display the patient results on the HED screen accordingly.

## List Test Case Tab



The List Test Cases tab displays all currently available test cases showing the case key combinations and management action icons. This tab consists of:

- **Sorting** function, to allow for sorting of the test cases by the:
  - o source practice ID
  - o patient ID
  - o SP ID
  - o artifact type
- Edit Case action icon opens the case details on the "Add/Edit Test Case" screen, where the user can modify the ID values and/or upload a new response payload for the test case.
- **Delete Case** action icon deletes the test case from the system. (Delete function is permanent. There is no recycle bin for deleted cases).
- **Filter Options** The filter drop down options contain only the practice name, patient id, provider name and artifact type.

## Add/Edit Test Case Tab

The Add/Edit Test Case tab serves two purposes:

- 1. Add new test cases by clicking on the tab.
- 2. Edit existing test cases by clicking the **Edit** icon of the test case from the **List Test Case** tab. When clicked, the edit screen displays the Add/Edit tab with fields populated by data from the selected test case.

#### Add Test Case

#### **Add Test Case Screen**

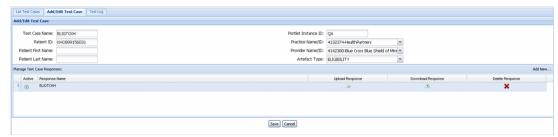


Required fields on this tab include:

- Test Case Name,
- Either the Patient Id, or the combined fields of Last Name + First Name
- Practice Name
- Provider Name
- Artifact Type

#### Edit Test Case

#### **Edit Test Case Screen**

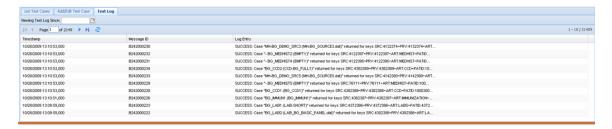


In the Manage Test Case Responses section of the Edit view:

- Modify ID values
- View payloads are displayed, and only one can be one identified as active at any time

- **Upload response** option enables the user to select a new test case to replace the existing
- **Download response** option enables user to view the message response
- Delete response option enables user to delete the message response from the system
- Add New... option enables the user to upload a new test case

## Test Log Tab



The Test Log tab displays Test HED responder log, used for troubleshooting purposes. Here the user is able to view:

- o a particular log in Test HED by precise timestamp
- o a particular log in TEST HED Connect message ID
- o whether a particular test was successful or failed
- information necessary to debug cases with the wrong combination of keys defined

#### Using the Test Log Tab:

Click to refresh the log with the latest tests

A log entry contains all information needed to set up a test case; practice id, provider id, patient id, artifact type and patient name

A log will show all requests for artifacts based on the sources the patient is associated with in the MPI.

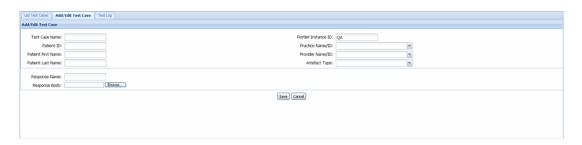
If the log shows SUCCESS, and yet the portlet does not display the data, then there is likely a problem with the data (or less likely a problem with the rls/connect setup). In this case, the Connect msgid can be taken from the log and forwarded to Covisint Messaging Team for investigation.

An error does not necessarily indicate a problem, but rather a test case for that key combination has not been set up.

If the test harness log shows ERROR, it simply means that the patient is associated with a practice/provider for which there is no test case set up.

## **Create New Test Case**

1. Click Add/Edit Test Case tab.



- 2. Key in all fields, as all are required.
- 3. In the *Response Name* field, create a name for the response that is easily recognizable by you.
- 4. In the *Response Body* field, click **Browse...** and select the response document you wish to attach to this case. (Response documents are created outside of Test HED Portal).
- 5. From the drop down menu, select:
  - a. Practice Name / ID
  - b. Provider Name / ID
  - c. Artifact Type
- 6. Click **Save**. The screen refreshes and the test case is created.

#### **RESULT:**

You have successfully created a test case.

## **Initiate a Test Case**

Complete the following steps in order to validate a request and response in Test HED Portal .

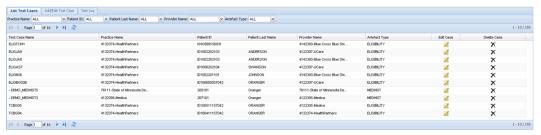
Look up a patient (via administrative or clinical views tab of your portal, depending on the artifact type)

View the appropriate artifact portlet - portlet will state 'x of x responded'.

The first number here is the number of simulated sources responded to the artifact request (i.e., how many test cases matched) and the second number is the number of sources providing this artifact type that the patient is associated with.

## Delete a Test Case Response

1. Navigate to the **List Test Case** tab.



2. Click (edit icon) in the Edit column of the test case you wish to edit. The test case is displayed in the Add/Edit Test Case screen with fields populated by data from the selected test case.



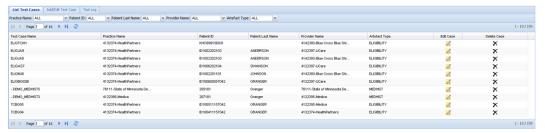
- 3. Click in the Delete Response column for the selected response name. The Select file pop up box is displayed.
- 4. Click Yes to confirm deletion.
- 5. Click Save.

#### **RESULT:**

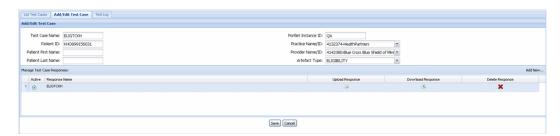
You have successfully deleted a test case response.

## Download a Response Document

1. Navigate to the List Test Case tab.



2. Click (edit icon) in the Edit column of the test case you wish to edit. The test case is displayed in the Add/Edit Test Case screen with fields populated by data from the selected test case.



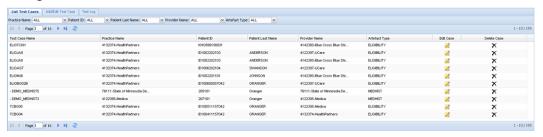
- 3. Click in the Download Response column for the selected response name.
- 4. Click **Open.** The response is displayed in a new window.

#### **RESULT:**

You have successfully downloaded a response document.

## Edit a Response Document

1. Navigate to the List Test Case tab.



2. Click (edit icon) in the Edit column of the test case you wish to edit. The test case is displayed in the Add/Edit Test Case screen with fields populated by data from the selected test case.



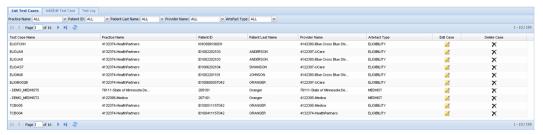
- 3. Click in the Upload Response column for the selected response name. The Select file pop up box is displayed.
- 4. Click **Browse...** and select the edited response document you wish to use as replacement.
- 5. Click **Save**. The pop up box is closed.
- 6. Click Save.

#### **RESULT:**

You have successfully edited a response document.

## **How to Edit Test Case Values**

1. Navigate to the List Test Case tab.



2. Click (edit icon) in the Edit column of the test case you wish to edit. The test case is displayed in the Add/Edit Test Case screen with fields populated by data from the selected test case.



3. Perform one or more of the following:

IF YOU WISH TO MODIFY THE	THEN:
Patient id number	key in the correct number in the Patient ID field.
Test case name	key in the correct name in the Test Case Name field.
Patient name	key in the correct patient name in the first name and/or last name field.
Portlet instance ID	key in the correct Instance ID in the Portlet Instance ID field.
Practice Name / ID	select a new Practice Name / ID from the drop down menu.
Provider Name / ID	select a new Provider Name / ID from the drop down menu.
Artifact type	select a new artifact type from the drop down menu.

4. Click Save.