

# Cadence Scheduling Test Script Template

Templates | Rules | MyChart | SIU |  
TechFitFlow.com

|                     |   |                       |       |
|---------------------|---|-----------------------|-------|
| <b>Test Cycle:</b>  | <input type="checkbox"/> Unit <input type="checkbox"/> Integrated <input type="checkbox"/> BAT <input type="checkbox"/> Dress Rehearsal | <b>Specialty:</b>     | _____ |
| <b>Tester:</b>      | _____   | <b>Date:</b>          | _____ |
| <b>Environment:</b> | _____   | <b>Build Version:</b> | _____ |

## PROVIDER TEMPLATE VALIDATION

| ID                 | Test Description / Steps   | Expected Result  | Status  | Notes / Defect Ref |
|--------------------|--|--|---|--------------------|
| <b>CAD-00</b><br>1 | Open provider template in test environment. Verify all slots display correct appointment types for each day of the week. | All slots show correct appointment types. No blank slots. Slot durations match appointment type default durations. | <input type="checkbox"/> Pass <input type="checkbox"/><br>Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-00</b><br>2 | Attempt to book an appointment in a hold slot as a scheduler. Confirm hold slot blocks booking.                          | Hold slot not bookable. Scheduler receives message that slot is unavailable. No appointment created.               | <input type="checkbox"/> Pass <input type="checkbox"/><br>Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-00</b><br>3 | Verify template activation date - confirm slots are bookable on go-live date and not before.                             | Slots visible from go-live date forward. No slots available before template activation date.                       | <input type="checkbox"/> Pass <input type="checkbox"/><br>Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-00</b><br>4 | Verify template end date - confirm no slots visible beyond the schedule period end date.                                 | No appointment slots visible beyond template period end date. Scheduler notified period ends.                      | <input type="checkbox"/> Pass <input type="checkbox"/><br>Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-00</b><br>5 | For rotating template provider: verify week A and week B slot patterns are correct and alternating.                      | Week A pattern displays on correct weeks. Week B pattern displays on alternate weeks. Cycle confirmed.             | <input type="checkbox"/> Pass <input type="checkbox"/><br>Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-00</b><br>6 | Book appointment in a slot. Confirm slot shows as booked and adjacent slots remain available.                            | Booked slot marked unavailable. Adjacent slots remain bookable. No unintended blocking of neighboring slots.       | <input type="checkbox"/> Pass <input type="checkbox"/><br>Fail <input type="checkbox"/> N/A |                    |

## APPOINTMENT TYPE AND SCHEDULING RULES

| ID                 | Test Description / Steps  | Expected Result   | Status  | Notes / Defect Ref |
|--------------------|---|---|---|--------------------|
| <b>CAD-00</b><br>7 | Attempt to book a "New Patient" appointment type into an "Established Patient" only slot. Confirm rule fires. | Scheduling rule blocks booking. Error message displayed to scheduler. New patient appointment not created in that slot. | <input type="checkbox"/> Pass <input type="checkbox"/><br>Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-00</b><br>8 | Attempt to book a specialist appointment without an active referral when referral rule is required.           | Referral requirement warning or block fires. Scheduler prompted to create referral or confirm override per policy.      | <input type="checkbox"/> Pass <input type="checkbox"/><br>Fail <input type="checkbox"/> N/A |                    |

|                |   |   |                           |  |
|----------------|---|---|---------------------------|--|
| <b>CAD-009</b> | Attempt to schedule an appointment beyond the provider's lead time limit (e.g., 90-day max). Confirm block. | No slots displayed beyond lead time limit. Scheduler informed of maximum scheduling window.                       | [ ] Pass [ ] Fail [ ] N/A |  |
| <b>CAD-010</b> | Attempt to overbook a slot beyond the configured overbook limit. Confirm overbook limit enforces.           | Overbook blocked beyond limit. Existing booked appointments in slot shown. Scheduler cannot add more.             | [ ] Pass [ ] Fail [ ] N/A |  |
| <b>CAD-011</b> | Book appointment for a patient who has a near-duplicate record. Confirm EMPI matching prompt fires.         | Duplicate patient warning fires. Scheduler presented with potential match. Merge or override path available.      | [ ] Pass [ ] Fail [ ] N/A |  |
| <b>CAD-012</b> | Book telehealth appointment type. Confirm appointment marked as telehealth and video link generates.        | Appointment created as telehealth type. Video link generated. Patient notification sent with video link included. | [ ] Pass [ ] Fail [ ] N/A |  |

**MYCHART SELF-SCHEDULING VALIDATION**

| ID             | Test Description / Steps   | Expected Result  | Status                    | Notes / Defect Ref |
|----------------|--|--|---------------------------|--------------------|
| <b>CAD-013</b> | Log in as established test patient in MyChart. Navigate to self-scheduling. Confirm correct appointment types visible. | Only MyChart-enabled appointment types for established patients display. No new patient types visible.               | [ ] Pass [ ] Fail [ ] N/A |                    |
| <b>CAD-014</b> | Log in as test patient and attempt to self-schedule with a provider marked as no self-scheduling (behavioral health).  | Behavioral health provider does not appear in self-scheduling search. Provider correctly excluded.                   | [ ] Pass [ ] Fail [ ] N/A |                    |
| <b>CAD-015</b> | Complete self-scheduling questionnaire with urgent symptom responses. Confirm routing redirects to correct path.       | Urgent response triggers redirect - patient routed to urgent care or nurse triage path, not standard scheduling.     | [ ] Pass [ ] Fail [ ] N/A |                    |
| <b>CAD-016</b> | Self-schedule a telehealth appointment as test patient. Confirm video link delivered via MyChart notification.         | Appointment booked. MyChart notification received with video visit link. Link launches video session correctly.      | [ ] Pass [ ] Fail [ ] N/A |                    |
| <b>CAD-017</b> | Attempt to self-schedule a new patient appointment type as an established patient (known to the practice).             | System identifies established patient relationship. New patient type not available. Established types shown instead. | [ ] Pass [ ] Fail [ ] N/A |                    |
| <b>CAD-018</b> | Cancel a self-scheduled appointment via MyChart. Confirm appointment cancelled in Cadence and slot reopens.            | Appointment cancelled. Slot reopens in provider schedule. Cancellation confirmation sent to patient via MyChart.     | [ ] Pass [ ] Fail [ ] N/A |                    |

**PATIENT REMINDERS AND NOTIFICATIONS**

| ID             | Test Description / Steps  | Expected Result  | Status                    | Notes / Defect Ref |
|----------------|---|--|---------------------------|--------------------|
| <b>CAD-019</b> | Book appointment with reminder-enabled appointment type. Confirm reminder fires at correct timing before appointment. | Reminder sent at configured interval (e.g., 48hr before). Correct appointment details in reminder content. | [ ] Pass [ ] Fail [ ] N/A |                    |

|                |   |   |  |  |
|----------------|---|---|--|--|
| <b>CAD-020</b> | Book telehealth appointment. Confirm telehealth-specific reminder includes video link in message content. | Telehealth reminder received. Video link included in notification. Link valid and launches session correctly. | <input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A |  |
| <b>CAD-021</b> | Book appointment for patient who has opted out of reminders. Confirm no reminder sends.                   | No reminder generated for opted-out patient. Appointment created without reminder workflow triggering.        | <input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A |  |

**SIU INTERFACE AND DOWNSTREAM SYSTEM VALIDATION**

| ID             | Test Description / Steps  | Expected Result  | Status   | Notes / Defect Ref |
|----------------|---|--|--|--------------------|
| <b>CAD-022</b> | Book new appointment in Cadence. Confirm SIU S12 message fires to RIS. Verify patient and appointment appear in RIS worklist.         | SIU S12 sent. RIS receives message. Patient demographics and appointment type populated in RIS worklist entry. | <input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-023</b> | Reschedule booked appointment to different date. Confirm SIU S13 fires. Verify RIS updates appointment record.                        | SIU S13 sent with new date/time. RIS appointment updated. Original slot reopened. New slot marked booked.      | <input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-024</b> | Cancel appointment in Cadence. Confirm SIU S15 fires. Verify RIS cancels record and slot reopens.                                     | SIU S15 sent. RIS marks appointment cancelled. Slot reopens in Cadence schedule for new bookings.              | <input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-025</b> | Mark patient as no-show at check-in. Confirm SIU S26 fires to patient engagement platform if configured.                              | SIU S26 sent. Patient engagement platform receives no-show event. Follow-up outreach workflow triggers.        | <input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-026</b> | Verify appointment type code mapping between Cadence and RIS - book appointment and confirm RIS procedure code matches mapping table. | RIS receives correct procedure code per mapping table. No unmapped code errors in interface monitor.           | <input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A |                    |

**DATA CONVERSION AND WAITLIST VALIDATION**

| ID             | Test Description / Steps   | Expected Result   | Status   | Notes / Defect Ref |
|----------------|--|---|--|--------------------|
| <b>CAD-027</b> | Select 10 converted appointments from legacy system. Verify appointment type, provider, time, and patient demographics match source. | All 10 converted appointments match legacy source. Appointment type mapping applied correctly. No demographic errors. | <input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-028</b> | Place test patient on waitlist for a provider. Confirm waitlist record created with correct urgency and appointment type.            | Waitlist record visible in Cadence. Urgency level set correctly. Appointment type and provider preferences recorded.  | <input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A |                    |
| <b>CAD-029</b> | Cancel an appointment that has a patient on the waitlist. Confirm waitlist notification fires correctly.                             | Cancelled slot triggers waitlist notification. Patient or scheduler notified of available slot per configuration.     | <input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A |                    |

**QA / Build Lead Sign-off:** \_\_\_\_\_     
**Scheduling Ops Sign-off:** \_\_\_\_\_     
**Date:** \_\_\_\_\_     
**Cycle #:** \_\_\_\_\_

