



USER ACCEPTANCE TESTING APPROVAL
New Implementation

KITTITAS COUNTY

Instructions: EBS requests your participation in user acceptance testing. Below is a checklist of the audits/actions that need to be tested in WORKTERRA. It is essential that these tests are performed to ensure the accuracy of your eligibility rules and benefit data. Use the issues log spreadsheet to track any issues found during testing.

- The checklist below provides a thorough review of test events that you should perform prior to going live with the application. Please ensure that you have audited and tested all of the appropriate categories below prior to approval.
- Signing off on this User Acceptance Testing form means you have reviewed and tested the application based on the test categories below and are ready to go live with WORKTERRA.
- **This User Acceptance Testing form must be completed and returned one week prior to going live. If the form is not received, go live will be postponed.**
- Once you are live with WORKTERRA, additional modifications to plans, business rules, screens, reports, or requests for additional data conversion may require additional service charges and completion of a new User Acceptance Testing form.
- Change Orders may affect the project timeline and estimated services costs.

User Acceptance Testing Completed:	
Audit Item:	Approve: (Yes/No)
Site branding (logo, colors, etc.) correct	YES
Confirm existing employee categories – review minimum of 3 to 5 employees to confirm correct structure exists for categories and statuses	YES
Add new employee to confirm the following:	YES
<i>Ensure correct employer-sponsored plans are automatically elected for the employee</i>	YES
<i>Ensure that only those eligible benefits for the employee are displayed</i>	YES
<i>Ensure employee rates (employee contributions) are correct-this includes Voluntary rates are calculating correctly.</i>	YES
<i>Confirm employer contributions are correct</i>	YES
<i>Confirm employer paid plan rates are calculating correctly</i>	YES
<u>Existing Employee Administration</u>	
Terminate Employee	YES
Confirm benefit termination dates correct	YES
Change employee Class information	YES
Change employee Status	YES
Approve/Reject pending life events using the Review Changes screen	YES
Approve/Reject pending EOI using the Pending EOI screen	YES
<u>Confirm data</u>	
Data Review- review demographics for employees to ensure they are correct	YES
Date Review – review enrollment data is load in WORKTERRA accurately. Confirmation includes correct count for each enrollment is checked for each plan housed in WORKTERRA	YES
<u>Employee Self Service</u>	
Username and Password-Login credentials setup correctly	YES
Employee Usage Agreement-Verbiage approval	YES
Legal Agreement-Verbiage approval	YES
Change Password page – confirm change password prompting is enabled after initial login	YES
<u>Qualifying Events – Employee tunnel (all events including New Hire)</u>	
Confirm Qualifying event list all events allowed for your Company- For New Hires there is no list to check. The confirmation for the New Hire event will be confirming that the New Hire window opens when expected.	YES
Landing Page – confirming landing page title and landing page verbiage	YES
Demographic page confirming fields and/or system messages/pop-up verbiage	YES
Spouse page confirming fields and/or system messages/pop-up verbiage	YES
Child page confirming fields and/or system messages/pop-up verbiage	YES
Confirm only benefits that are eligible for the event, that is currently open, only shows up in	YES



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the event tunnel YES	
Confirm pending life event Change Approval box verbiage is accurate (Change Approval box only shows for events that have a pending action on the event itself like Child Birth, Marriage, etc.)	YES
Confirm extra verbiage/pop-ups on benefit enrollment pages on each benefit type are showing correctly-this includes the confirmation of the benefit type names and the plan names	YES
Confirm EOI page shows up when expected and confirm the EOI popup shows what is expected to show	YES
Confirm effective date- this depends on what event is open for the tunnel. For example the effective date for the New Hire tunnel should show the effective date that follows the New Hire rules.	YES
Beneficiary page confirming system messages/pop-up verbiage	YES
Confirmation Statement Layout	YES

Accepted: My signature below indicates that I have completed testing and agree to *GoLive*.

Karol Weller

2/1/18

Signature

Date

Karol Weller Configuration Specialist

Print Name, Title and Organization