

# UAT Guide – Release #16, Cycle 1

## Career Plan – Recommended Services

### Contents

Overview .....	1
Purpose.....	1
UAT Release #16 – Cycle 1 Expectations & Homework.....	1
Homework Areas .....	2
Due Date.....	2
Access to UAT Environment.....	2
Reporting Issues .....	2
Expectations for UAT .....	3
Best Practices for Effective UAT.....	4
Step-by-Step Guide .....	4
Navigating to the Career Plan Recommendations Tab .....	5
Viewing the layout of the Recommendations tab .....	7
Expanding and Collapsing Goals .....	8
Selecting Goals, Objective, and Services and Using Selections.....	9
Viewing Recommendations Moved to the Plan.....	10
Incomplete Goals, Objectives, and Services on the Plan .....	11

## Overview

User Acceptance Test (UAT) Release #16 cycle 1, has been deployed to the SIU UAT environment. Security constraints for this environment will require a login through the State Login Portal. When you follow the link to the UAT environment, the system will route the user to the State of Illinois Login. After a successful login, the user will be returned to the UAT environment where IWDS-2.0 is running.

When the user is returned to the UAT environment, there will be NO security role permission constraints to access the application at this time. Security permissions will be deployed later.

It is still important not to enter any personal identifiable information (PII).

## Purpose

The purpose of Release #16 cycle 1 is to review **Recommended Services** as the first tab on the **Career Plan**. The UAT cycle will be open from **March 18th – March 27<sup>th</sup>, 2026**. This provides you with 7 working days to complete the review. Your participation is appreciated.

## UAT Release #16 – Cycle 1 Expectations & Homework

### Homework Areas

For this week, UAT tasks will focus on the following key areas listed below:

- Navigating to the Recommendations tab of the Career Plan
- Viewing the layout of the Recommendations tab
- Expanding and Collapsing Goals
- Selecting Goals, Objective, and Services and Using Selections
- Viewing Recommendations Moved to the Plan
- Incomplete Goals, Objectives, and Services on the Plan

### Due Date

Please complete your testing in these areas and submit your feedback by **EOD Friday, March 27<sup>th</sup>**. This will give us an opportunity to address any issues prior to the next release.

### Access to UAT Environment

To access the UAT environment in your browser, follow the link provided here.

<https://testapps.illinoisworknet.com/iwdst-Preview>

## Reporting Issues

Please document any issues, bugs, or enhancement requests you identify in our shared notebook [UAT 16 - Recommended Goals Objectives and Services](#). The main purpose of using a shared notebook is for collaboration between members

of the UAT team and Business Analysts. This will cut down on duplicate issues being reported.

When logging your entries:

- You should document this information as you are completing your UAT work.
  - The first page of the notebook is labeled as Example Issue Reporting. Please refer to that page to get an idea of how you can report an issue.
  - In the notebook, you will find a section labeled Release #16 – Cycle 1. The section is divided into several pages; each page is specific to the pages of the training plan. Ensure that each item is tracked under the correct category for the cycle and feature set you are providing feedback on.
  - Be concise but detailed.
  - If multiple issues arise in one area, log each one separately for clarity.
  - Please add your name/initials to your entry.
- **If you have issues accessing the OneNote notebook-** Please contact one of the Business Analysts (BA) on the team. The business analysts are:
    - Laura Menke - [laura.menke@siu.edu](mailto:laura.menke@siu.edu)
    - Kelly Trimble- [kelly.trimble@siu.edu](mailto:kelly.trimble@siu.edu)
    - Andi Grabemeyer - [andi.grabemeyer@siu.edu](mailto:andi.grabemeyer@siu.edu)
    - Al Menke - [al.menke@siu.edu](mailto:al.menke@siu.edu)
    - Olivia Miller - [olivia.miller@siu.edu](mailto:olivia.miller@siu.edu)
    - Lynette Tritz - [lynette.tritz@siu.edu](mailto:lynette.tritz@siu.edu)

## Expectations for UAT

As you test these areas, please keep in mind the following best practices:

- **Test Thoroughly:** Ensure that you navigate through all functions and features within these areas. Pay attention to any discrepancies between expected and actual results. Please explain your expected results and the actual results you found.
- **Detail-Oriented:** When reporting issues, provide as much context as possible, including:
  - Steps to reproduce the issue
  - Screenshots or recordings, if possible
  - Browser or device used during testing
  - Actual outcome vs. Expected outcome

- **Feedback Categories** – The SIU team will categorize your findings into three (3) possible classifications.
  - **Bugs**- When the system does not perform as expected, and the system is not performing according to the requirements, then a bug will be reported, tracked, fixed, and retested.
  - **Issues**- If the system is performing according to the requirements, but the user feels that the requirement was not captured correctly or now the user feels like the requirement is just not working as expected, then this is recorded as an issue. Issues are tracked and prioritized for change.
  - **Enhancements**- Once we are in UAT and the users recognize an area that could be improved, then this will be also logged as an issue and tagged as an enhancement.

## Best Practices for Effective UAT

- **Think like the end user:** Approach your testing from the perspective of someone unfamiliar with the system. This will help us identify usability issues and areas for improvement.
- **Be specific and thorough:** The more specific your feedback, the easier it will be to address. Include specific steps, expected outcomes, and actual results.
- **Provide context:** Always give context for your feedback. For instance, explain why an enhancement would improve the user experience or system performance.

By following these guidelines and providing detailed feedback, you're helping to ensure the final product meets user expectations and performs as intended.

## Step-by-Step Guide

Managing the career plan is an essential part to assist a customer in reaching their goals. This UAT will focus on viewing the systems **Recommendations tab of Goals, Objectives, and Services** and the steps to move those recommendations into the Plan.

The career plan is in the context of an application that has been certified for one or more programs in WIOA. IWDS-2.0 the career plan is a universal career plan, dynamic and active, replacing the previous hard copy Individual Employment Plan (IEP) and Individual Service Strategy (ISS).

### Navigating to the Career Plan Recommendations Tab

Before getting into the essential elements of working with the **Career Plan Recommendations tab**, we will discuss the steps necessary to access a customer, their active application, and navigation to the career plan area.

**Note:** *In the current system, we have not associated the user with a career planner role or LWIA. Because of this, you will see all customers on the customer landing page, and it will not default to a specific LWIA's or career planner's customer.*

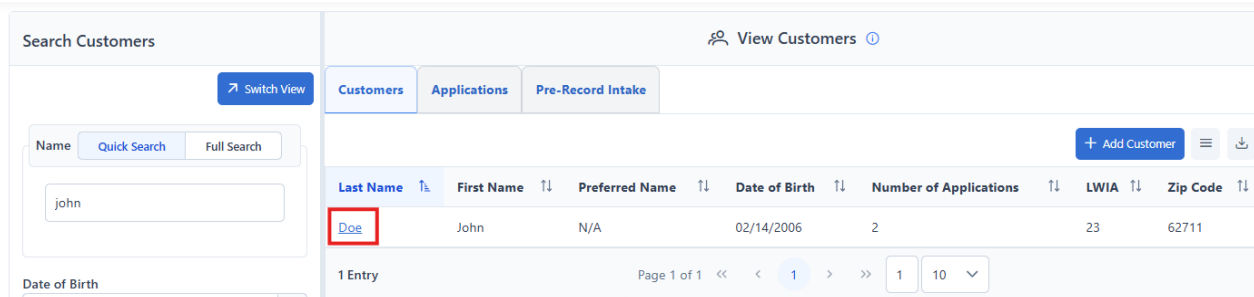
Select **Customers** from the main menu. This will navigate to the **Customers** management landing page.



The **Customers' landing page** is a two (2) panel page with a **Search Customers panel** on the left and a **View Customers panel** below.

**Note:** *Since the customer landing page has been covered in multiple UAT sessions, it will not be covered here; we will go directly to selecting the customer.*

When you find the **Customer** with an **Application** in the list that you want to work with, select the **Name link**.



**Note:** *Each UAT user will be issued a customer persona, please find that customer in the list and select it.*

After selecting the **Customer Link**, the **Customer Profile** page will open. Find the **Applications** section in the middle of the page to see the active application in a grid. The **Actions View Icon** is located at the far right of the row.

← Back to Customer List

- Customer Information
- Intake Summary
- Profile Information
- Participant Summary Tools
- Case Notes
- Self Services & Information Only Services
- Referrals
- Assessments
- Uploads
- Resumes
- Logs

Customer Profile: John Doe >

Customer Information

Edit

First Name John	Middle Initial 	Last Name Doe
Preferred Name John	Primary Phone Number N/A	Address SPRINGFIELD, 62711
Pronouns N/A	Primary Phone Receives Text Messages N/A	Email test@test.com
Date of Birth 02/14/2006	Secondary Phone Number N/A	Preferred Communication Method N/A
Age 20 years, 21 days old	Secondary Phone Receives Text Messages N/A	LWIA N/A
IwN ID 0	IwN Username N/A	

Intake Summary

Prescreenings

+ Start Intake Process

Completion Type	↑↓	Status	Expires On	↑↓	Actions
No Prescreenings Found!					

Applications

Name	App Date	↓↑	Program	Sub-Program	Status	↑↓	Career Planner	↑↓	Actions
John Doe	02/24/2026		WIOA	Dislocated Worker (WIOA 1D), Youth (WIOA 1Y)	Applicant		SALLY PFLIBSEN		<span style="border: 2px solid red; padding: 2px;">👁</span>
John Doe	02/21/2026		WIOA	Adult (WIOA 1A)	Applicant		SALLY PFLIBSEN		👁

2 Entries

Page 1 of 1 << < 1 > >> 1 10 ▾

When selecting the **Actions View Icon**, it moves the user to the “What Area Do You Want to Work In?”.

UAT Guide - Release 16 - Recommendations

-6-

3/12/2026

Select the Career Plan in the “What Area Do You Want to Work In?” selection dropdown.

After selecting the **Career Plan** area, a three-tab page is displayed with **Recommendations** as the first tab, **Plan** as the second tab, and **Signatures** as the third tab. Also displayed are two Area **Expansion Bars**.

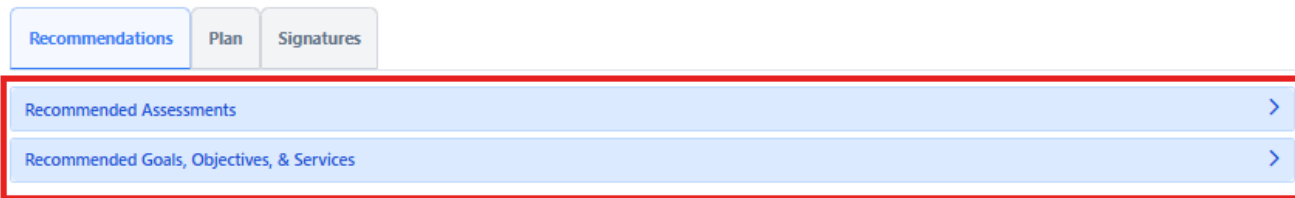
*Note: You can go directly to the Recommendations tab by clicking the Quik Links link “Recommendations”.*

## Viewing the layout of the Recommendations tab

The Recommendations tab of the Career Plan area has two (2) expansion areas, one for **Required Assessments** and the other for **Recommended Goals, Objectives, and Services**.

**Note:** The **Recommendations** are generated from the questions and answers provided in the **Pre-Screening, Getting Started Assessment, and Application**

**Note:** *Recommended Assessments are being changed to Required Assessment*



The first step is to understand the layout. Start by expanding the Goals, Objectives, and Services expansion area. When an area expands, the **expansion bar appears darker**. Once the **Recommended Goals, Objectives, and Services** bar has been expanded, the **default page** has the **Goal Types** collapsed with a chevron to expand.

Review the **icon key**, the **goal list**, and **chevrons** for expanding and collapsing the areas.

## Expanding and Collapsing Goals

Expansion of chevrons are at the left of the Goals. Understand how to expand and collapse the Goals to see the associated Objectives and Services, and the hierarchy of Goals, Objectives, and Services.

Recommended Assessments >

Recommended Goals, Objectives, & Services ▾

Goals Objectives Services # of Selections: (0) Goals, (0) Objectives, (0) Services + Use Selected

- >  Use the skills from your training or apprenticeship to get and keep a full-time job.
- >  Start a new career in [Career Cluster] by using my strengths and learning new skills in an industry I haven't worked in before.
- >  Get a full-time job like the one you had before in [Career Cluster], with similar or better pay and benefits.
- ▾  Get a part-time or seasonal job while working on your career planning, job training, or school goals. [View On Plan](#)
  - Create and adjust your resume and cover letter to match the job you want.
  - Apply to part-time or seasonal job openings that match your skills, abilities, and interests.
  - Job Search Activities and Assistance (STAFF ASSISTED) [View On Plan](#)
- >  Take part in a hands-on work program to explore a new career in [Career Cluster] and build new skills.
- >  Start your own business in [Career Cluster] and build a strong future by being your own boss.
- >  Get Ready for or complete an Associate Degree in [career cluster] for career stability and growth. [View On Plan](#)
- >  Get ready for or earn a Bachelor's Degree in [career cluster] to open up more job chances and move up.

## Selecting Goals, Objective, and Services and Using Selections

To move recommendations into the plan, the **checkboxes** can be selected, and then the **Use Selected** button will move those **Recommendations** into the **Plan**.

Recommended Goals, Objectives, & Services ▾

Goals Objectives Services # of Selections: (1) Goals, (1) Objectives, (1) Services + Use Selected

- >  Use the skills from your training or apprenticeship to get and keep a full-time job.
- >  Start a new career in [Career Cluster] by using my strengths and learning new skills in an industry I haven't worked in before.
- >  Get a full-time job like the one you had before in [Career Cluster], with similar or better pay and benefits.
- ▾  Get a part-time or seasonal job while working on your career planning, job training, or school goals.
  - Create and adjust your resume and cover letter to match the job you want.
  - Apply to part-time or seasonal job openings that match your skills, abilities, and interests.
  - Job Search Activities and Assistance (STAFF ASSISTED)

## Viewing Recommendations Moved to the Plan

Once recommendations are moved to the plan, the career planner will recognize these are in the plan because they will show in a slightly different de-emphasized font and the preceding checkbox will be checked.

**Note:** There will also be a “View On Plan” green pill at the end of Goals, Objectives and Services that have been added to the Plan. Selecting this Pill will take you directly into Viewing that Goal, Objective and Service.

## Incomplete Goals, Objectives, and Services on the Plan

When **Goals**, **Objectives**, and **Services** are moved into the **Plan** they will start with a status of *incomplete*. This provides a visual to know which items must be edited before they are usable on the **Plan**.

[← Back to Customer Profile](#)

**Quick Links**

- Overview
- Intake - Prescreening
- Career Plan
  - Recommendations
  - Plan
  - Signatures
- Outcomes
  - Credentials
  - Measurable Skill Gains
  - Employment
  - Education
- Follow-Up
  - Transition
  - Exit Summary
  - Occurrences & Activities

**Participant Summary Tools**

- Case Notes
- Self Services & Information Only Services
- Referrals
- Assessments
- Uploads
- Resumes
- Logs

Customer Profile: John Doe >

Application Summary >

What Area Do you Want to Work In?  
Career Plan

Recommendations | **Plan** | Signatures

**Manage Goals, Objectives & Services**

Key: ● Goals b Objectives ✎ Services

View: All | Select a Goal or Objective: Select a Goal or Objective... + Add Goal and Objectives + Add Service

Type	Name	Status	Start Date	Actions
Follow-Up	Keep a steady job in [specific field/occupation] and meet regularly with a career planner to talk about your job, set goals, and build on your success at work.	Not Started	N/A	<span style="color: blue;">⦿</span>
	Talk with your career planner every month for a year to help with your job and future career.	Not Started	N/A	<span style="color: orange;">b</span>
Employment	Get a part-time or seasonal job while working on your career planning, job training, or school goals.	Incomplete	N/A	<span style="color: blue;">⦿</span>
	Create and adjust your resume and cover letter to match the job you want.	Incomplete	N/A	<span style="color: orange;">b</span>
Education	Get Ready for or complete an Associate Degree in Computer and Mathematical for career stability and growth.	Not Started	02/27/2026	<span style="color: blue;">⦿</span>
	Join college readiness programs and career workshops to make a clear school plan.	Not Started	N/A	<span style="color: orange;">b</span>
	English Language Education	Open	02/27/2026	<span style="color: blue;">⦿</span>
	Career Planning	Planned/Not Started	N/A	<span style="color: blue;">⦿</span>

<span style="color: orange;">b</span> Talk with your career planner every month for a year to help with your job and future career.	Not Started
<span style="color: blue;">⦿</span> Get a part-time or seasonal job while working on your career planning, job training, or school goals.	Incomplete
<span style="color: orange;">b</span> Create and adjust your resume and cover letter to match the job you want.	Incomplete