

UAT Guide – Release #28-Cycle 2

Career Plan: Signature Prompt Updates

Contents

Overview	1
UAT Release #28 – Reports Expectations & Homework.....	2
Homework Areas	2
Universal Career Plan (UCP) Signature Prompt Workflow & Rules:	2
For this UAT cycle, tasks will focus on the following key areas:	2
Due Date	3
Access to UAT Environment.....	3
Reporting Issues	3
Expectations for UAT	3
Best Practices for Effective UAT.....	4
Purpose of the Updated Signature prompts	4
Message box appearing on the Plan Tab.....	5

Overview

This guide directs stakeholders through the User Acceptance Testing (UAT) for **IWDS 2.0 Release #28 – Career Plan Signature Prompts**

Prior to the execution of the Universal Career Plan (UCP), a signature must be obtained from the career planner and the customer. There has been a change request to modify the system to not allow a service status to be set to anything, but “Plan Not Started” prior to signatures being obtained.

When any UCP is modified (after a signature has been obtained) by adding or discontinuing an employment, training, or education Goal, the system will require a new signature before any Services can be started. The system will add a message to the top of the Career Plan indicating that the signature is needed prior to opening Services for the new Goal.

UAT Release #28 – Understanding Signature Prompts

Universal Career Plan (UCP) Signature Prompt Workflow & Rules:

Trigger Event / System State	Signature Message Behavior	Service Status Rules
Goal Added	Message appears at the top of the UCP and on the Service View Page with a caution info bubble on the goal.	Service status cannot be changed to “Open”. Status dropdown displays message indicating signatures are required.
Signatures Obtained on the signature tab. (Customer & Career Planner)	All messages and warning icons cleared. Restrictions from executing the services are removed.	Full status functionality is restored, and the messages in the status dropdown are removed.
Goal edited and set to Discontinued.	Message appears at the top of the UCP and on the Service View Page with a caution info bubble on the goal.	Service status cannot be changed to “Open”. Status dropdown displays message indicating signatures are required.
Signatures Pending	Each time the UCP is opened, the messages will continue to appear at the top of the UCP and on any service view page within the UCP until the new signatures are obtained.	Service status cannot be changed to “Open”. Status dropdown displays message indicating signatures are required.

For this UAT cycle, tasks will focus on the following key areas:

- **Visual Review** – Review the header message, warning icon on the Goal, Messages in the Service View header, Status dropdown message
- **Content Accuracy** – Verify the message accurately reflects the rules
- **Triggers** – Verify the actions taken trigger the appropriate message display and event stops
- **Responsive Design** – Test the UCP pages at different screen sizes (desktop, tablet, mobile) when the message is displayed

Due Date

Please complete your testing in these areas and submit your feedback by

Locals: By NOON on Wednesday, October 14.

State: By EOD on Tuesday, October 21.

Access to UAT Environment

To access the pages for testing in your browser, follow the link provided here:

[IW DST UAT Environment \(Pink Banner with THIS IS A TEST SITE logo\)](#)

Note: For Locals, Test site will not be available until Friday, Oct 9th

Reporting Issues

Please document any issues, bugs, or enhancement requests you identify in our *shared notebook*

[Release 28 UCP Signature Prompts UAT Notebook](#)

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:

- Document issues as you complete your UAT work
- Be concise but detailed
- Log each issue separately for clarity
- Add your name/initials and date to each entry
- Include screenshots when possible

If you have issues accessing the OneNote notebook - Please contact one of the Business Analysts (BA) or Managers on the team:

- Al Menke - al.menke@siu.edu (Project Manager)
- Kelly Trimble - kelly.trimble@siu.edu (Outreach Manager)
- Laura Menke - laura.menke@siu.edu (BA)
- Lynette Tritz - lynette.tritz@siu.edu (BA)
- Olivia Miller - olivia.miller@siu.edu (Product Manager)
- Robert Kelch - robert.kelch@siu.edu (BA)

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.

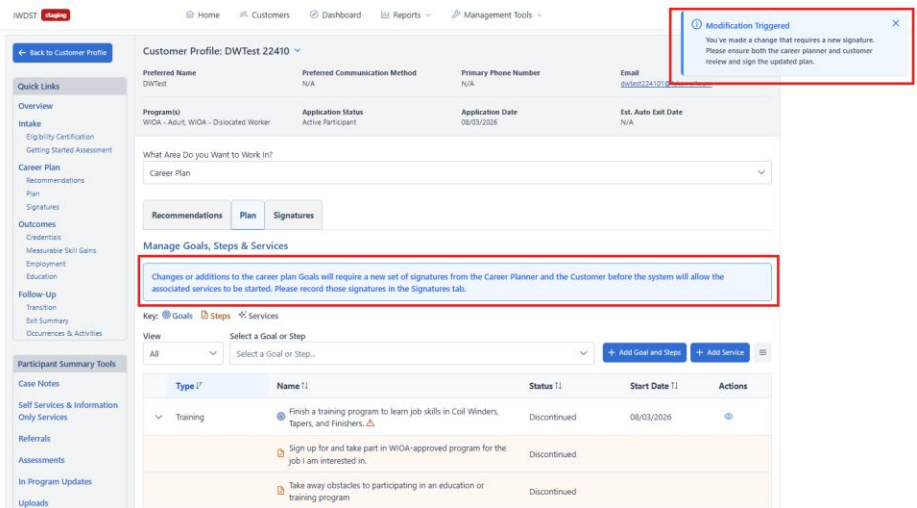
Purpose of the Updated Signature prompts

The Potential Use of the signature prompt is to enforce compliance by preventing any service status from progressing beyond "Plan Not Started" until required signatures are obtained from both the customer and career planner upon the initial execution of a Universal Career Plan (UCP) or whenever an employment, training, or education Goal is added or discontinued.

Message box appearing on the Plan Tab

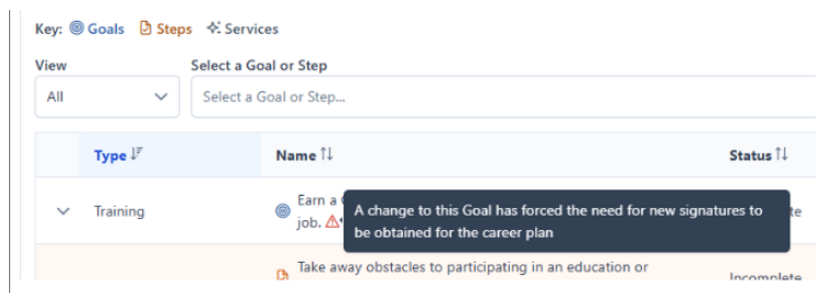
1. When a **new goal is added** to the plan, then *the signature message will appear* at the top of the page after the goal and step have been saved.

This will be shown whenever the UCP is opened until signatures are obtained.



The screenshot shows the UCP system interface. At the top right, a blue message box states: "Modification triggered. You've made a change that requires a new signature. Please ensure both the career planner and customer review and sign the updated plan." Below this, in the "Manage Goals, Steps & Services" section, a red-bordered box contains the text: "Changes or additions to the career plan Goals will require a new set of signatures from the Career Planner and the Customer before the system will allow the associated services to be started. Please record those signatures in the Signatures tab."

2. At the **end of the Goal Name**, there will be *a warning info bubble icon*. By hovering over this icon, the information bubble will appear, explaining the change in the plan will require a signature before continuing.



The screenshot shows a close-up of the "Manage Goals, Steps & Services" section. A goal named "Earn a job." is listed with a warning icon (a triangle with an exclamation mark) at the end of its name. A tooltip bubble appears over this icon, stating: "A change to this Goal has forced the need for new signatures to be obtained for the career plan."

3. Open a service under the new goal and view the service. You will notice a banner at the top of the service view page.

Occupational Skills Training

[← Back to Career Plan](#)

Program(s): WIOA - Adult (1A) Service Level: Training Services

Changes or additions to the career plan Goals will require a new set of signatures from the Career Planner and the Customer before the system will allow the associated services to be started. Please record those signatures in the Signatures tab.

[Edit](#)

Sub Program
Adult (1A)

Goal
Finish a training program to learn job skills in [occupation (ONET)].

Step
Sign up for and take part in WIOA-approved program for the job I am interested in.

ITA Funded Training
Yes

Contract Funded Training
No

Select the Training Program
160 Driving Academy — 160 Driving Academy

Select Training Program Location
160 Driving Academy - Montgomery — 700 S. Lake Street, Montgomery

CIP Code

4. Edit the service and select the status dropdown. Notice the messages in the dropdown. Also, you cannot select Open status.

Select Training Program Location *

160 Driving Academy - Montgomery — 700 S. Lake Street, Montgomery

CIP Code *

Driver and Safety Teacher Education.

Description: A program that prepares individuals to teach driver and safety education programs at various educational levels.

O*Net Code *

Architectural and Engineering Managers

DOTL Tier: 6

Weekly Hours *

22

Completion Status *

Select an answer

Filter options

Planned Not Started

Open
(updated signatures are required before 'Open' can be selected)

Successful Completion
(updated signatures are required before 'Successful Completion' can be selected)

5. Access the signature tab and obtain both the customer and the career planner signatures.

Once the signatures are obtained, the messages will go away and then services can be opened.

What Area Do you Want to Work In?
 Career Plan

Recommendations Plan **Signatures**

Customer Signatures

Customer Signature Status: **Signature Obtained**

Customer Signature Action* Select a Signature Action... Finalize Action

Action Name	Status	Updated By	Actions
Signature Obtained Manually	Signature Obtained	Laura Menke 10/07/2026 4:12 PM	⬇
Signature Obtained Manually	Signature Obtained	Laura Menke 10/07/2026 4:04 PM	⬇
Signature Obtained Manually	Signature Obtained	Laura Menke 10/06/2026 1:23 PM	⬇

Career Planner Signatures

Career Planner Signature Status: **Signature Obtained**

Career Planner Signature Action* Select a Signature Action... Finalize Action

Action Name	Status	Updated By	Actions
Electronically Signed	Signature Obtained	Laura Menke 10/07/2026 4:13 PM	⬇

6. Review the UCP and make sure all messages are gone.

Customer Profile: DWTest 22410

Preferred Name DWTest	Preferred Communication Method N/A	Primary Phone Number N/A	Email dwttest224101@fakemail.com
Program(s) WIOA - Adult, WIOA - Dislocated Worker	Application Status Active Participant	Application Date 08/03/2026	Est. Auto Exit Date 11/02/2026

What Area Do you Want to Work In?
 Career Plan

Recommendations Plan **Signatures**

Manage Goals, Steps & Services

Key: 🎯 Goals 📅 Steps ⚙️ Services

View Select a Goal or Step
 All Select a Goal or Step... + Add Goal and Steps + Add Service

Type	Name	Status	Start Date	Actions
Training	🎯 Finish a training program to learn job skills in Coil Winders, Tapers, and Finishers.	Completed	08/03/2026	🎯
	📅 Sign up for and take part in WIOA-approved program for the job I am interested in.	Completed		
	📅 Take away obstacles to participating in an education or training program	Completed		
	⚙️ Training Paid by Non-WIOA Title I Funds	Successful Completion	08/03/2026	🎯
	📅 Complete the Getting Started Assessment to create a	Completed	08/03/2026	🎯

7. Review the service view page. There should be no messages.

Customer Profile: DWTest 22410 >

Training Paid by Non-WIOA Title I Funds

[← Back to Career Plan](#)

Program(s):
WIOA - Adult (1A), WIOA - Dislocated Worker (1D)

Service Level:
Training Services

[Edit](#)

Sub Program
Adult (1A)

Goal
Finish a training program to learn job skills in [occupation (ONET)].

Step
Sign up for and take part in WIOA-approved program for the job I am interested in.

Providing Entity
Association House of Chicago*, Association House
1116 N Kedzie, Chicago, IL 60651

Supplier
Association House of Chicago*, Association House

Completion Status
Successful Completion

Start Date
08/03/2026

End Date
08/04/2026

[Case Note History](#)

8. Open the service. You should be able to set the service status to open.

Sub Program *
Adult (1A) x v

Goal *
Finish a training program to learn job skills in [occupation (ONET)]. x v

Step *
Sign up for and take part in WIOA-approved program for the job I am interested in. x v

Providing Entity *
Association House of Chicago*, Association House
1116 N Kedzie, Chicago, IL 60651 x v

Supplier
Association House of Chicago*, Association House [Refer Service](#)

Completion Status *
Select an answer v

Filter options

Planned Not Started

Open

Successful Completion

Discontinued

9. Now edit the goal and discontinue the Goal and save. The signature message prompt should re-appear.

Customer Profile: DWTest 22410

Preferred Name DWTest	Preferred Communication Method N/A	Primary Phone Number N/A	Email dwttest224101@faicemail.com
Program(s) WIOA - Adult, WIOA - Dislocated Worker	Application Status Active Participant	Application Date 08/03/2026	Est. Auto Exit Date 11/02/2026

What Area Do you Want to Work In?
 Career Plan

Recommendations Plan Signatures

Manage Goals, Steps & Services

Changes or additions to the career plan Goals will require a new set of signatures from the Career Planner and the Customer before the system will allow the associated services to be started. Please record those signatures in the Signatures tab.

Key: Goals Steps Services

View: Select a Goal or Step
 All Select a Goal or Step... + Add Goal and Steps + Add Service

Type	Name	Status	Start Date	Actions
Training	Finish a training program to learn job skills in Coil Winders, Tapers, and Finishers.	Discontinued	08/03/2026	
	Sign up for and take part in WIOA-approved program for the job I am interested in.	Discontinued		
	Take away obstacles to participating in an education or training program	Discontinued		