

UAT Guide – Release #29

Career Plan: Adding Duplicate Goal

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Overview

This guide directs users through the User Acceptance Testing (UAT) for **IWDS 2.0 Release #29 – Career Plan Adding a Duplicate Goal**

Currently, the system does not allow the same goal to be added twice to a career plan. This rule meets the original requirements. However, there are circumstances where a customer needs to change their goal. This applies to situations where the customer starts working towards completing a training or education goal and then decides the occupation will not meet their needs. In these situations, the system should provide the career planner with the capability to close out the original goal, steps, and service and then add the same goal again with the new occupation (ONET/CIP/Career Cluster) without losing the information and services provided on the original goal in the career plan. This change covers the following updates to the system.

1. Modifies the Goal Add/Edit forms to allow the same goal to be added again if there is no other goal with the same name in a status of (Not Started or In Progress).
2. All steps for the original goal must be in Completed or Discontinued status.
3. When editing or adding a new service to the new goal, the service templates cannot allow the user to select any Completed or Discontinued goals and steps.
4. When a service is added to a goal, the system will link the service to that goal. If the participant has multiple episodes of the same service type under different goals, the Career Plan table will display the service details from

the episode associated with the corresponding goal.

UAT Strategy

The strategy of this UAT is to test the process of completing or discontinuing a Goal and then adding the same goal again to the UCP. The tester should try adding the duplicate goal without completing or discontinuing the original goal, making sure the system does not allow that action. The tester should also try adding different goals and steps to the UCP to make sure normal processing did not change.

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

By NOON on Thursday, October 21st.

Access to UAT Environment

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

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

Reporting Issues

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

[Release 29 UCP Adding a Duplicate Goal 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.

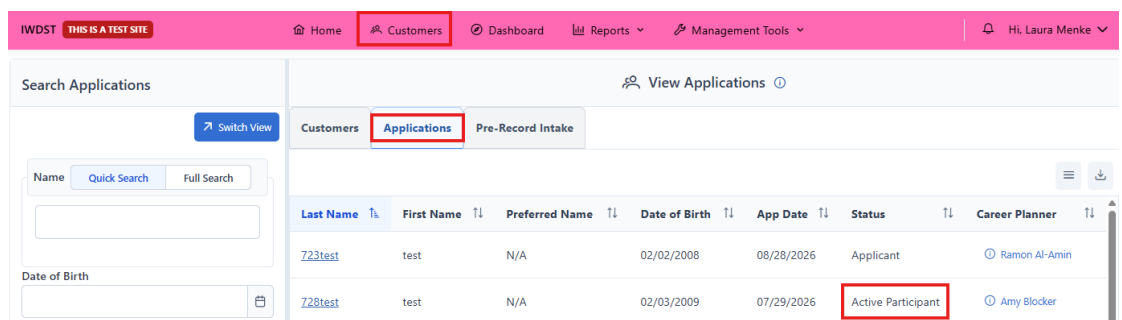
By following these guidelines and providing detailed feedback, you're helping to ensure the final product meets user expectations and performs as intended.

Purpose of the Ability to Add a Duplicate Goal Ability to Add a Duplicate Goal

This applies to situations where the customer starts working towards completing a training or education goal and then decides the occupation will not meet their needs. In these situations, the system should provide the career planner with the capability to close out the original goal, steps, and service and then add the same goal again with the new occupation (ONET/CIP/Career Cluster) without losing the information and services provided on the original goal in the career plan.

Adding a Duplicate Goal to the Plan

1. Open the Career Plan for an active customer.



The screenshot shows the IWDST system interface. The top navigation bar includes 'Home', 'Customers', 'Dashboard', 'Reports', and 'Management Tools'. The 'Customers' tab is selected, and the 'Applications' sub-tab is active. On the left, there is a 'Search Applications' section with fields for 'Name' and 'Date of Birth'. The main area displays a table of applications. The second application is highlighted, showing a status of 'Active Participant'.

Last Name	First Name	Preferred Name	Date of Birth	App Date	Status	Career Planner
723test	test	N/A	02/02/2008	08/28/2026	Applicant	Ramon Al-Amin
728test	test	N/A	02/03/2009	07/29/2026	Active Participant	Amy Blocker

2. Look for a completed Goal, Step, and Service on the plan. If there are no completed Goals, Steps, or Services, then please complete a set.

Customer Profile: test 728test

Preferred Name test	Preferred Communication Method N/A	Primary Phone Number N/A	Email 728test@fakemail.com
Program(s) WIOA - Youth	Application Status Active Participant	Application Date 07/29/2026	Est. Auto Exit Date N/A

Key: ● Goals 📄 Steps ✳️ Services

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

Type	Name	Status	Start Date	Actions
Training	Finish a Registered Apprenticeship Program to achieve recognized certification.	Completed	07/29/2026	👁
	Visit employers, go to career fairs, and attend events to find apprenticeship sponsors.	Completed		
	Career Awareness, Guidance, and Exploration (2 episodes)	Open	09/16/2026	👁
	Labor Market Information (LMI)	Unsuccessful Completion	07/29/2026	👁
Education	Get Ready for or complete an Associate Degree in Architecture and Engineering for career stability and growth.	Completed	10/12/2026	👁
	Join college readiness programs and career workshops to make a clear school plan.	Completed		
	Post-Secondary Prep & Transition Activities	Successful Completion	10/12/2026	👁

3. Add the same Goal, Step, and Service to the plan as the completed Goal you found.

The system will allow this to record a change in the plan

Customer Profile: test 728test

Preferred Name test	Preferred Communication Method N/A	Primary Phone Number N/A	Email 728test@fakemail.com
Program(s) WIOA - Youth	Application Status Active Participant	Application Date 07/29/2026	Est. Auto Exit Date N/A

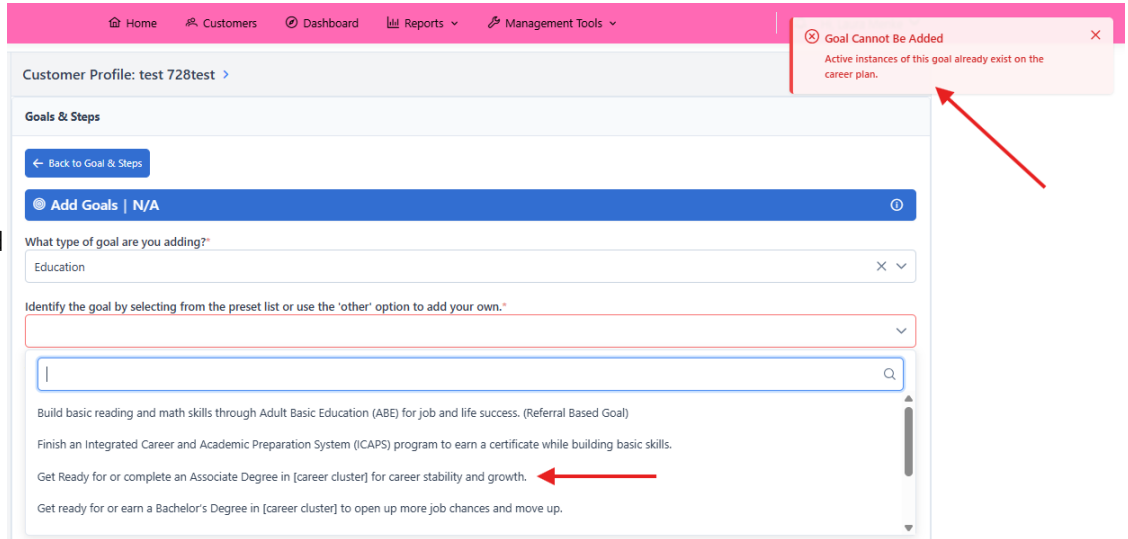
View: All Select a Goal or Step: Select a Goal or Step... + Add Goal and Steps + Add Service

Type	Name	Status	Start Date	Actions
Training	Finish a Registered Apprenticeship Program to achieve recognized certification.	Completed	07/29/2026	👁
	Visit employers, go to career fairs, and attend events to find apprenticeship sponsors.	Completed		
	Career Awareness, Guidance, and Exploration (2 episodes)	Open	09/16/2026	👁
	Labor Market Information (LMI)	Unsuccessful Completion	07/29/2026	👁
Education	Get Ready for or complete an Associate Degree in Architecture and Engineering for career stability and growth.	Completed	10/12/2026	👁
	Join college readiness programs and career workshops to make a clear school plan.	Completed		
	Post-Secondary Prep & Transition Activities	Successful Completion	10/12/2026	👁
Education	Get Ready for or complete an Associate Degree in Food Preparation and Serving Related for career stability and growth. (Copy) ⚠️	Not Started		👁
	Join college readiness programs and career workshops to make a clear school plan.	Not Started		
	Post-Secondary Prep & Transition Activities	Planned/Not Started		👁

Trying to Add a Duplicate Goal when the current Goal is Discontinued or Completed

- Using the same Career Plan, try to add the Goal again.

The system will NOT allow this and provide an appropriate message.



The screenshot shows the 'Goals & Steps' section of the system. A red error message box in the top right corner states: 'Goal Cannot Be Added. Active instances of this goal already exist on the career plan.' Below the error message, there is a list of goals. The goal 'Get Ready for or complete an Associate Degree in [career cluster] for career stability and growth.' is highlighted with a red arrow. The goal 'Get ready for or earn a Bachelor's Degree in [career cluster] to open up more job chances and move up.' is also visible.