UAT Release # Cycle 1 - Guide
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UAT Guide – Release #10, Cycle 1

Customer Pre-Record Duplicate Merge, Outcomes Employment, Education

Contents

Overview

User Acceptance Test (UAT) Release #10 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 at a later date.

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

Purpose

The purpose of Release #10 cycle 1 is to review the three (3) different features. The first feature is the Pre-Record Duplicate Detection and Merge, the second and third features are in the Outcomes area of the customer/application context. The UAT cycle will be open from January 28th – February 12th, 2026. This provides you with 10 working days to complete the review. Your participation is appreciated.

UAT Release 10 – Cycle 1 Expectations & Homework

Homework Areas

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

- Pre-Record Intake Duplicate Detection
- Case Management Outcomes
  - Employment Tracking
  - Education Enrollments

Due Date

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

EOD Thursday, February 12th.

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 Notebook Link. 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 10 – 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:
  - Olivia Miller - olivia.miller@siu.edu
  - Lynette Tritz - lynette.tritz@siu.edu
  - Al Menke – al.menke@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

The following step-by-step guide will lead you through these features.

Customer Pre-record Intake

The purpose of the Pre-Record Intake feature is to potentially eliminate creating a number of duplicate customer profiles in the system, or to locate a customer pre-record and create a profile if one has not been created. This is important in IWDS-2.0 because the customer can use a self-service portal to start entering their information. If the customer has started this process and there is already a profile in the system for that customer, then we want to merge the data collected in the pre-record into with the existing customer profile. If there is no customer profile in the system, then the intake specialist or career planner can create a new customer profile with the pre-record data.

Steps to Access the Customer Pre-Record Intake area

1. Use the top menu bar to locate and select the Customers menu item.
2. Select the Pre-Record Intake tab on the right panel, above the customer listing grid.
3. There will be a list of customer Pre-Records that have already been created in the system. Each of these records in the list have columns for:
    a. Last Name
    b. First Name

   c. Phone
   d. Email
   e. DOB (Date of Birth)
   f. Progress
   g. Zip
   h. LWIA
4. The Last Name is a link into the Duplication search window. When selected the duplicate search window will open.

Duplicate Customer Search page

1. After selecting a last name link on the Customer Pre-Record Intake list, the duplicate customer search page will be opened.
2. This page will be pre-filled with the attributes of the customer pre-record.
3. This page will automatically search upon entry, using those attributes passed from the list.
4. You can change the fields and search multiple times. The concept is to find any customer profile records in the system that may be a match to the pre-record data that you currently have.
5. Potential matches are shown in the grid at the bottom of the page.
6. There are four (4) possible actions you can take from this page.
   a. Cancel – Return to the intake list either using the Cancel button or the Back to Intake List button
   b. Add the Customer – When you do not find any matches to merge this pre-record into, you can just add the customer as a new profile by selecting the Add Customer button.
   c. Merge the record - In the Actions column of the rows returned in the match list, there is a merge icon. By using this merge icon, it will merge the pre-record with the customer indicated in the row.
   d. Quick View – In the Actions column of the rows returned in the match list, there is a quick view icon. By selecting the quick view button, a view panel will display at the right of the screen showing more details for the customer profile. From this quick view panel, you can merge to this customer profile or go to the customer profile details. If you select the view icon a second time it will close the quick view panel.

Outcomes – Capturing Employment

Employment outcomes can be captured within a customer profile and application context by utilizing the Outcomes area and Employment tab.

Navigating to the Outcome Employment tab

1. Use the top menu bar to locate and select the Customers menu item.
2. Find a customer with at least 1 application by scrolling through the list, using the search filter in the left panel, or by selecting other pages using the pagination controls at the bottom of the list.
3. When a customer is found that you would like to use, then select the last name link and the system will open the customer profile page.
4. In the customer profile page, you will see an area just below the profile details that is labeled Applications.
5. Under the Applications header is a grid that shows applications.
6. In an Applications row, under the Actions column, select the view icon; this will open the application (case management area) for that customer application.
7. At the top of this page, you will see a question labeled "What Area Do you Want to Work In?". Just under that question is a drop-down selection field with Intake, Career Plan, Outcomes, and Follow-up.
8. Select the Outcomes item.
9. The system will change the view to show the Outcomes tabs of Credentials, Measurable Skill Gains, Employment, and Education. For this UAT release, we will only be focusing on Employment and Education.
10. Select the Employment Tab. You should see an Add Employment button with a Column selector to the right of the button and a grid below the button with the column headers of Employer Name, Job Title, Start Date, End Date, and Actions.

Adding a new Employment Occurrence

1. Select the Add Employment button. The Add Employment – Search for Employer page will display. This page will allow you to search for an employer in the Entity Management records within IWDS-2.0 or Dunn & Bradstreet records.
2. Enter part of an employer name in the Employer Name field and enter any other fields that you would like to be included in the search like parts of the address, a count, the state, or zip. Then select the Search button.
3. The system will look for matches in Entity Management as well as Dunn & Bradstreet at the same time. Just click on the Dunn & Bradstreet tab to see any results.
4. At the right of each record returned from the search is a checkbox. If you find the employer that you believe matches, then select the checkbox and the employer selected will display just above the two tabbed search results grid.
5. If you want to use that selection, then select Continue – Use Selected button.
6. If you do not check any results, you can go ahead and add a new employer by selecting the Continue – Add Employer button.
7. There are four (4) actions you can take on this screen.
    a. Select the Search button and view the results

b. Select the Continue – Use Selected button (if you select a row from the search returned results)
c. Select the Continue – Add Employer button (if you did not select a row from the search returned results)
d. Cancel – Returns to the Outcomes Employment tab.

Finish Adding the Employment Record

When you continue from the Add Employment – Search for Employer page, you land on the Add Employment page to finish adding the employment information.

1. You will need to fill out all required fields on the page. Don't skip optional fields if you have the information; it is always better to complete the entire page. The following fields are required.
   a. Employer Name
   b. Address Line 1
   c. City
   d. State
   e. Zip Code
   f. Start Date
   g. Employment Status (Entered Employment, Still Employed)
   h. Job Title
   i. Job Type (Full-Time, Part-Time, Temporary or Seasonal, Independent Contractor or Self-Employed)
   j. Wage Type (Hour, Year, Mile)
   k. Wages
   l. Hours per Week or Miles Per Week
   m. NAICS Code
   n. O*NET Code
2. When you select the wage type of Hour or Year, then the system displays Hours per Week in the third column. Selecting Miles will change the third column label to Miles per Week.
3. The Wages have maximum reasonable ranges to catch mistypes in those fields. Hourly wages must be less than $1,000. Yearly wages must be less than or equal to $500,000. Milage wages must be less than or equal to $5.00 per mile. Also, mileage must be less than or equal to 4,000 miles each week.
4. When all required fields are entered, select the save button and the record will be saved, and the system will route back to the Employment tab with the new record in the grid.

Note: Currently the system is routing the user back to the Credentials tab. This is a noted defect in the system.

5. To view and edit the record, use the view icon in the row under the Actions column.

Outcomes – Capturing Education Enrollments

Education Enrollment outcomes can be captured within a customer profile and application context by utilizing the Outcomes area and Education tab.

Navigating to the Outcome Education tab

1. Use the top menu bar to locate and select the Customers menu item.
2. Find a customer with at least 1 application by scrolling through the list, using the search filter in the left panel, or by selecting other pages using the pagination controls at the bottom of the list.
3. When a customer is found that you would like to use, then select the last name link and the system will open the customer profile page.
4. In the customer profile page, you will see an area just below the profile details that is labeled Applications.
5. Under the Applications header is a grid that shows applications.
6. In an Applications row, under the Actions column, select the view icon; this will open the application (case management area) for that customer's application.
7. At the top of this page, you will see a question labeled "What Area Do You Want to Work In?". Just under that question is a drop-down selection field with Intake, Career Plan, Outcomes, and Follow-up.
8. Select the Outcomes item.
9. The system will change the view to show the Outcomes tabs of Credentials, Measurable Skill Gains, Employment, and Education. For this UAT release, we will only be focusing on Employment and Education.
10. Select the Education Tab. You should see an Add Enrollment button with a Column selector to the right of the button and a grid below the button with the column headers of Provider, Program, Start Date, End Date, and Actions.

Adding a new Education Enrollment Occurrence

1. Select the Add Enrollment button. The Add Education Enrollment page will be displayed. This page will allow you to search for a provider in the Entity Management ETPL records within IWDS-2.0.
2. When you type a provider name, the system will automatically search for providers within the system that contain the characters you type. If one of the providers found is the provider you would like to use, then just select that provider. If the provider is not found, then you can go ahead and add the provider.
3. When a provider has been selected and you enter the Program Name field, the programs available from the provider will be displayed to select. If the provider was not selected and you added the provider, then you will also have to add the program name.

4. Complete the required fields on the page as well as fields that are not required if you have the information. The required fields are as follows:
    a. Provider Name
    b. Program Name
    c. Start Date
    d. Enrollment Status (Full-Time, Part-Time)
    e. Educational Enrollment Type
5. Once the page is completed, then select the Save button at the bottom of the page. The record will be saved, and you will return to the Outcomes area – Education tab, and the new item will be in the grid.
6. To view and edit the record, use the view icon in the row.