UAT Guide – Release #15, Cycle 1

Customer Credentials, Transition, Follow-Up Exit Summary and Activities

Contents

Overview

User Acceptance Test (UAT) Release #15 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 features for this UAT release, at this time. Security roles & permissions will be deployed later. This means that any user can act as career planner to execute this UAT.

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

Purpose of UAT Release

The purpose of Release #15 cycle 1 is to review the Customer Outcomes Credential page, Follow-Up area Transition page, Exit Summary page and Occurrences & Activity page. Understand that the customers you are assigned will not be in a state where they can be transitioned due to time constraints that cannot be managed in these test cases. When the system goes under a full end-to-end UAT, appropriate aging test cases will be available. However, when we look at the transition page, we can manipulate the exit dates by manipulating the last service end dates.

UAT Release #15 – Cycle 1 Expectations

Feature Areas

For this UAT, the following key areas will be reviewed:

- Customer Outcomes – Credentials page
- Customer Follow-Up area – Transition page
- Customer Follow-Up area – Exit Summary page
- Customer Follow-Up area – Occurrences & Activities page

Due Date

Please complete your testing in these areas and submit your feedback by EOD Thu, 03/29/2026.

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 on the IWDS Transition Project Page under Full List of Resources: IWDST Full Resources titled "UAT Notebook 2026". 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 #12 – Cycle 1. The section is divided into several pages; each page is specific to the pages of the process. 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:
    - Al Menke - al.menke@siu.edu
    - Olivia Miller - olivia.miller@siu.edu
    - Lynette Tritz - lynette.tritz@siu.edu
    - Laura Menke - laura.menke@siu.edu
    - Andi Grabemeyer - andi.grabemyer@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.

Understanding the Purpose of these IWDS-2.0 Features

Customer Outcomes – Credentials

Credential attainment is a core performance indicator used to measure the effectiveness of workforce programs. Tracking credentials for a customer ensures that career planners can document the tangible educational and occupational gains a customer achieves because of services received — particularly training services funded through Individual Training Accounts (ITAs) or on-the-job training agreements. Credential data captured in IWDS-2.0 feeds directly into PIRL reporting and supports Illinois' ability to demonstrate program return on investment, meet negotiated performance targets, and satisfy audit requirements. Accurate credential tracking also enables service providers to connect a customer's credential outcome to the specific program, training provider, and ETPL-listed course that produced it, maintaining the chain of accountability required by federal and state policy. Finally, and above all other reasons to track credentials is for the career planner to ensure, with the customer, that the customer meets their goals and objectives.

Examples of Credentials Tracked:

- **Occupational Licenses** — State-issued licenses required to legally practice a trade or profession (e.g., Certified Nursing Assistant (CNA), Commercial Driver's License (CDL), HVAC technician license)

- **Industry-Recognized Certifications** — Credentials awarded by industry bodies validating occupational competency (e.g., CompTIA A+, AWS Certified Cloud Practitioner, OSHA 10/30)

- Registered Apprenticeship Certificates — Completion certificates issued upon finishing a DOL-registered apprenticeship program
- Postsecondary Degrees and Diplomas — Associate's or Bachelor's degrees, or diplomas from accredited institutions tied to training funded through WIOA
- Recognized Postsecondary Credentials (RPCs) — The broader federal category encompassing any credential meeting WIOA's definition, including stackable credentials and certificates of completion from accredited programs
- Secondary School Diplomas / HSEDs — High school equivalency credentials (e.g., GED, HiSET) for customers in Adult or Youth program services working toward basic skills benchmarks

Program Exit Determination Across Adult, Dislocated Worker, and Youth Programs

Under WIOA regulations, the exit determination process varies significantly between adult programs and youth programs, with critical implications for co-enrolled customers. For Adult and Dislocated Worker programs, a customer exits after 90 consecutive days of no services received, with the exit date established as the last date of service prior to this 90-day period.

Youth programs operate under different exit criteria where customers exit after 90 days without a program service or 90 days without contact attempting to provide a service, recognizing that youth engagement often requires more intensive outreach and relationship maintenance. However, Illinois WIOA policy establishes a specific requirement for co-enrolled customers:

When an individual is co-enrolled in both Adult (or Dislocated Worker) and Youth programs, the customer cannot exit from either program until both programs meet their respective 90-day no-service thresholds. This means that if a co-enrolled customer receives a Youth service on day 85 of their Adult program's exit countdown, the Adult program exit clock resets, and both programs must begin new 90-day counts.

Career planners must maintain meticulous documentation distinguishing which services apply to which funding stream while recognizing that any qualifying service in one program prevents exit from all programs in which the customer is co-enrolled. The complexity increases when customers transition from Youth to Adult programs upon reaching age 24, requiring a programmatic exit from Youth and potential enrollment in Adult services to maintain continuous support.

Performance Outcome Measures: Adult/Dislocated Worker vs. Youth Requirements

The performance accountability indicators differ substantially between adult and youth programs, reflecting their distinct target populations and program objectives. Adult and Dislocated Worker programs share the same six primary indicators:

- Employment rate second quarter after exit
- Employment rate fourth quarter after exit
- Median earnings second quarter after exit

- Credential attainment, measurable skill gains, and effectiveness in serving employers.

In contrast, Youth programs track:

- Employment or education placement in the second quarter after exit
- Employment or education placement in the fourth quarter after exit

Median earnings, credential attainment, measurable skill gains, and effectiveness in serving employers—with the critical distinction that youth can meet employment indicators through either employment OR enrollment in postsecondary education or advanced training, acknowledging that continued education is an equally valid outcome for younger customers.

For co-enrolled customers under Illinois policy, performance outcomes must be reported separately for each program in which they are enrolled, and while the exit dates will be synchronized due to the co-enrollment exit requirement, the outcome attribution and verification methods may differ between programs.

This creates challenges; positive outcomes benefit all programs in which the customer is enrolled, but career planners must ensure data quality across multiple program records and that credential attainment or employment outcomes are appropriately attributed using each program's specific verification standards. The follow-up periods remain consistent at second quarter (90 days post-exit) and fourth quarter (one-year post-exit) for both program types, but the acceptable verification methods may differ, with youth programs allowing more flexibility in documenting educational enrollment versus the wage record emphasis in adult programs.

Post-Exit, Follow-Up Services, and Co-Enrollment Complexity

Follow-up services and documentation requirements must be tailored to each program type. A critical distinction in Illinois WIOA policy is that Adult and Dislocated Worker customers can begin receiving follow-up services immediately upon gaining employment, even before the 90-day exit period has elapsed—this allows career planners to provide job retention support, career coaching, and other stabilization services during the crucial early employment period without waiting for the formal exit to occur. These pre-exit follow-up services are particularly valuable for supporting new employees through their probationary periods and addressing barriers that might jeopardize job retention. Youth follow-up services, in contrast, can only begin after the formal exit from the program and encompass a broader range of supports including mentoring, educational persistence support, work-related peer support groups, and adult education and employment services.

For co-enrolled customers, career planners face the unique challenge that while they can provide Adult follow-up services upon employment, the synchronized exit requirement means that if Youth services continue, the customer technically remains active in both programs and the 90-day exit clocks for both programs continue to reset. The documentation must clearly distinguish between follow-up services provided under Adult/Dislocated Worker programs (which can occur pre-exit upon employment) and ongoing Youth program services (which prevent exit from occurring), ensuring that service coding and funding stream attribution accurately reflect Illinois policy requirements.

IWDS-2.0 must accommodate this complexity by maintaining distinct program enrollment records that track when Adult follow-up services begin relative to employment dates, while also monitoring the synchronized exit countdown that applies to all co-enrolled programs, with verification documentation meeting the specific evidentiary standards of each program type, whether that's UI wage records for adult programs or educational transcripts and enrollment verification for youth programs.

Step-by-Step Guide

The following step-by-step guide will lead you through the user interface for this set of features in UAT. The objective here is to test the training program renewal process and training program edit process.

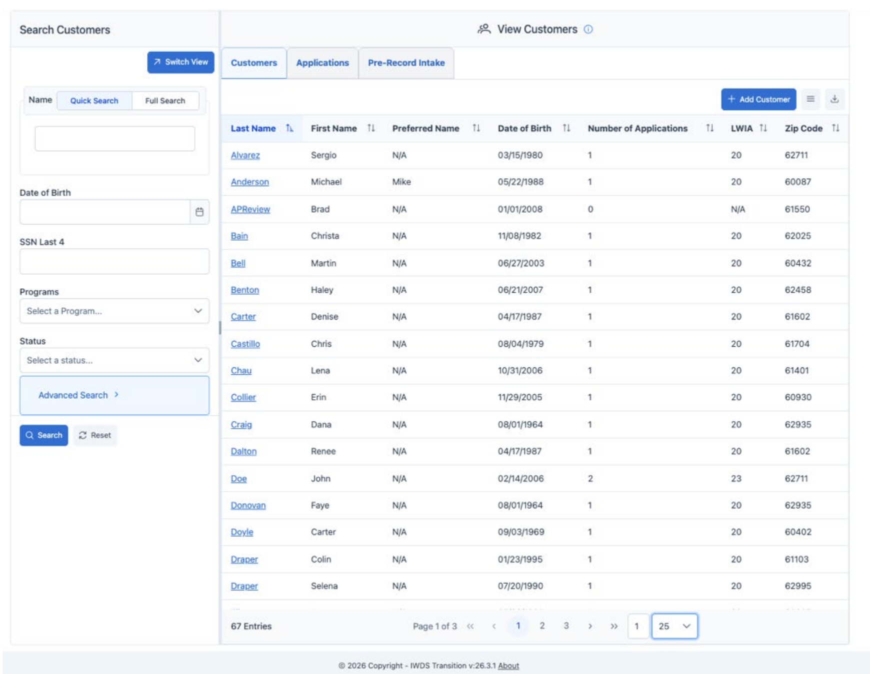
Navigating to the Customer Open Application

The main purpose of these first steps is to access a customer's Follow-Up area.

Note: Each user will be given a unique Customer (accessed using Customers) and an application setup and assigned in the participation page of the UAT Notebook.

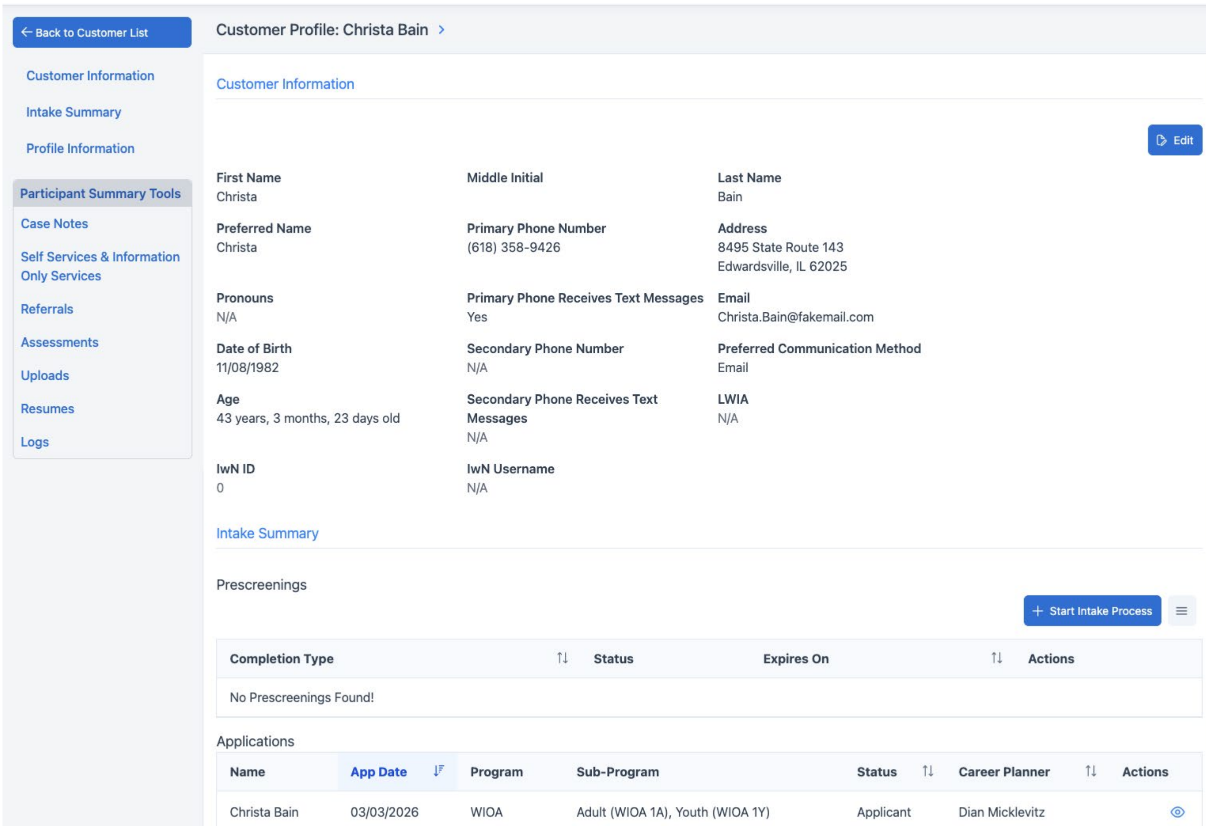
Accessing a Customer

1. Use the top menu bar and select **Customers**
   The View Customers landing page will display. This is a two (2) panel display with the search panel on the left and the customer list on the right. The first page of all customers will load automatically on entry.



2. Using the **Search** panel, type in part of your assigned customer name and select the **[Search]** button. The list will then reload using the search criteria you supplied.

3. Select the Name link on the customer in the list. The customer profile page will open.

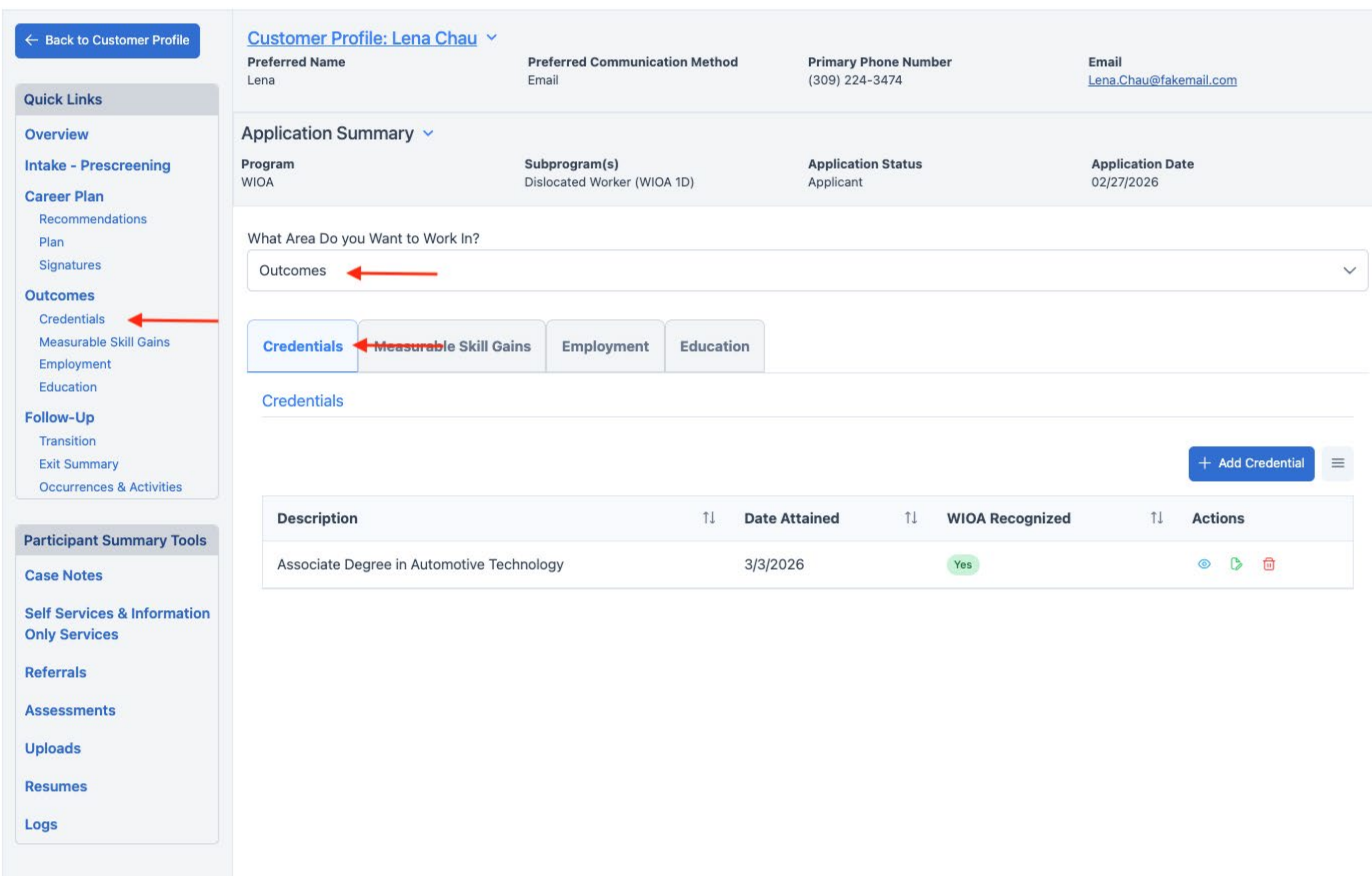


On the Customer Profile Page, in the Applications section, a list of applications for the customer will display. In the customer application row, under the Actions column is the view icon.

Customer Outcome Credentials

After selecting a customer and opening an application, there are two (2) ways to access the Outcomes – Credentials page. First, on the left side of the page is the Quick Links navigation panel. Just select the Credentials Quick link and you will jump directly to the page.

The second way is to select Outcomes in the What Area Do You Want to Work In dropdown. Then select the Credentials tab (the system defaults to the Credentials tab).



Once in credentials, the user will see the Credentials tab page and the Credentials header under the tab. Under the header is the credentials grid. At the top of the grid you will see four (4) columns.

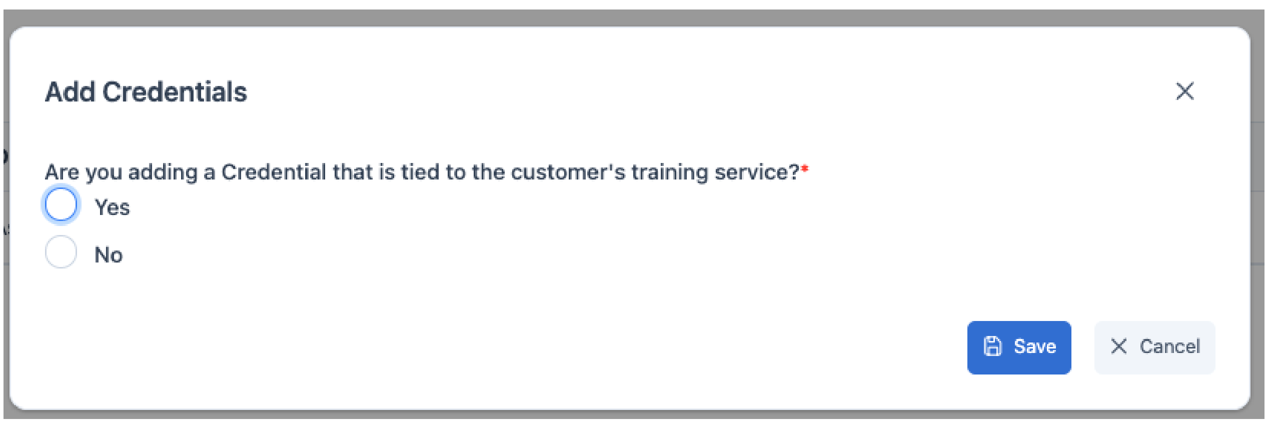
- Description
- Date Attained
- WIOA Recognized
- Actions – View, Edit, Delete

When the user first comes into a test case or even a new customer later in production, the grid most likely will be empty. In the image above, we are showing an Associate Degree in Automotive Technology as a credential.

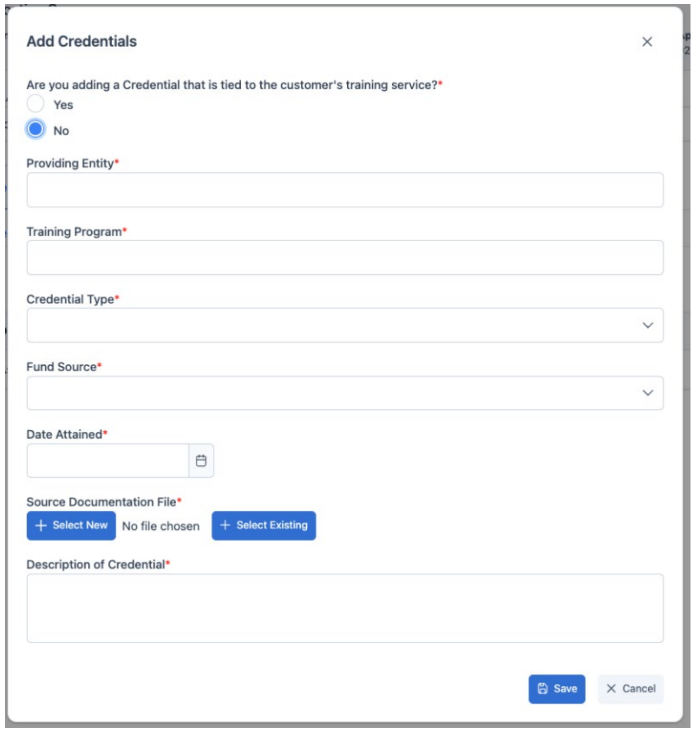
Add a Credential

The next steps will lead the user through adding a credential.

First, select the Add Credential button. There are two options starting in this popup modal, adding a credential tied to a customer's training program, or not tied to a program.



Select the No first. When selecting No the popup expands and looks like the image below.



The fields on this page work as follows:

- Providing Entity – This is a required text field and names the provider of the program
- Training Program – This is a required text field and names the training program
- Credential Type – This is a required selection field with the following options to describe the credential type.
    - Industry-Recognized Certificate
    - Certificate of Completion of a Registered Apprenticeship Program
    - License Recognized by State or Federal Government
    - Associate Degree
    - Baccalaureate Degree
    - Institution of Higher Education (IHE) certificate of completion
    - Secondary School Diploma or Equivalent
    - Community College Certificate of Completion
    - Industry Recognized Certification
    - Other Type
- Fund Source – This is a required selection field with the following options to describe funding source.
    - Employer Funded

    - Another Grant Program
    - Scholarship
    - Personal Funds/Self Paid
    - State Funded (Non-WIOA) Program
    - Federally Funded (Non-WIOA) Program
    - Union or Trade Association
    - Other (Please Specify)
- Date Attained – This is a required date entry field with a date picker to set the date for attainment.
- Source Documentation File – This is a required field for uploading evidence of credential attainment.

Once all fields are completed, select the Save button to save the record. Select the Cancel button to ignore the changes and return to the Credentials tab.

Editing a Credential

To edit the credential, select the edit icon on the credential row in the grid. The same modal popup that was used to add the record will open for editing.

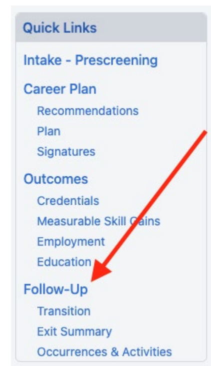
Deleting a Credential

To delete a credential, select the delete icon (trash can) on the credential row in the grid. A delete confirmation window will request confirmation for the delete, and the system will delete the credential.

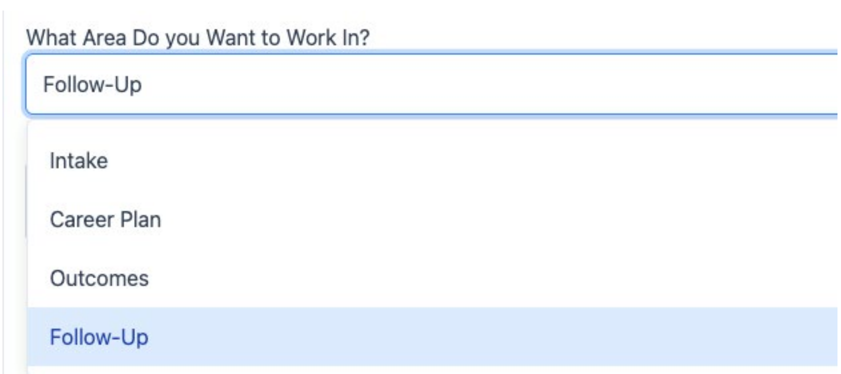
Follow-up Transition

The transition area can be accessed in two ways also.

1. Select the View icon and the application will open.
   There are two (2) ways to get to the Follow-Up area. The first method is from the Quick Links section of the left panel navigation.

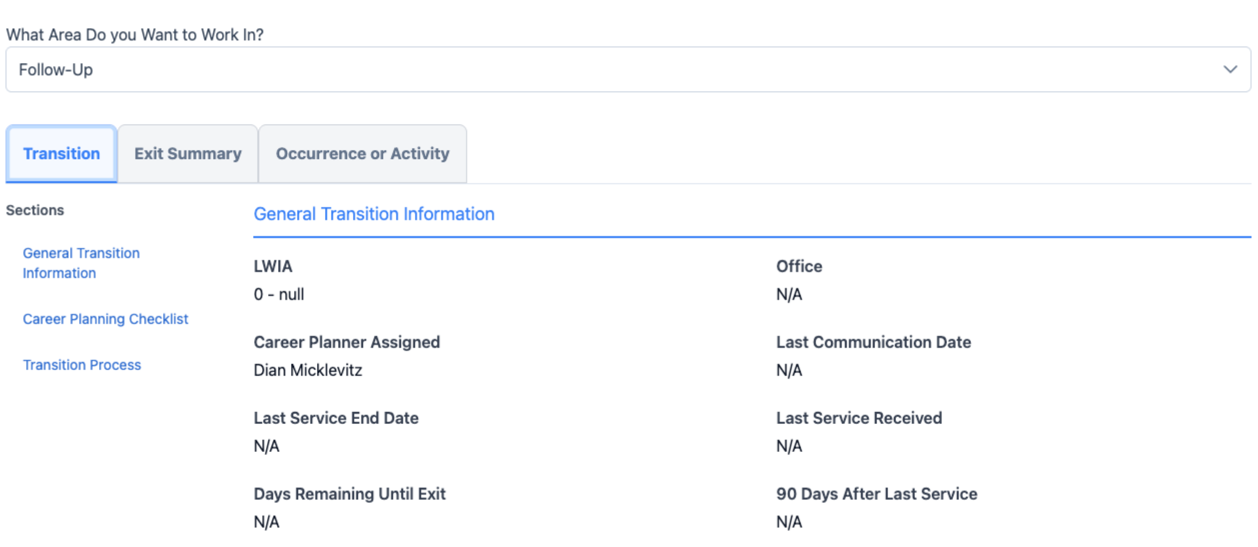


   The second method is to select Follow-Up in the What Area Do You Want to Work In?



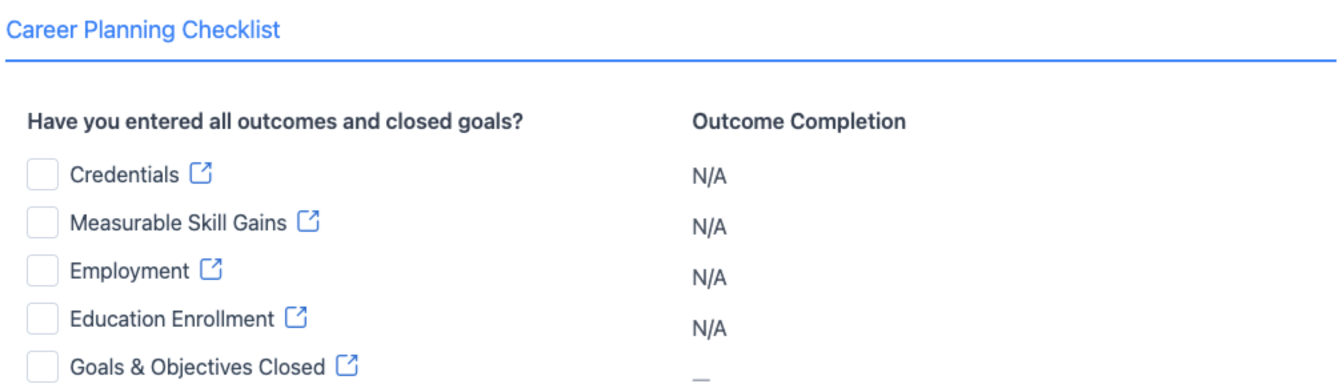
2. Once the user has navigated to the Follow-Up area, there will three (3) tabs, Transition, Exit Summary, and Occurrences or Activity. Select the Transition Tab.

   There are three (3) sections on the Transitions page. The top section is the General Transition Information section.

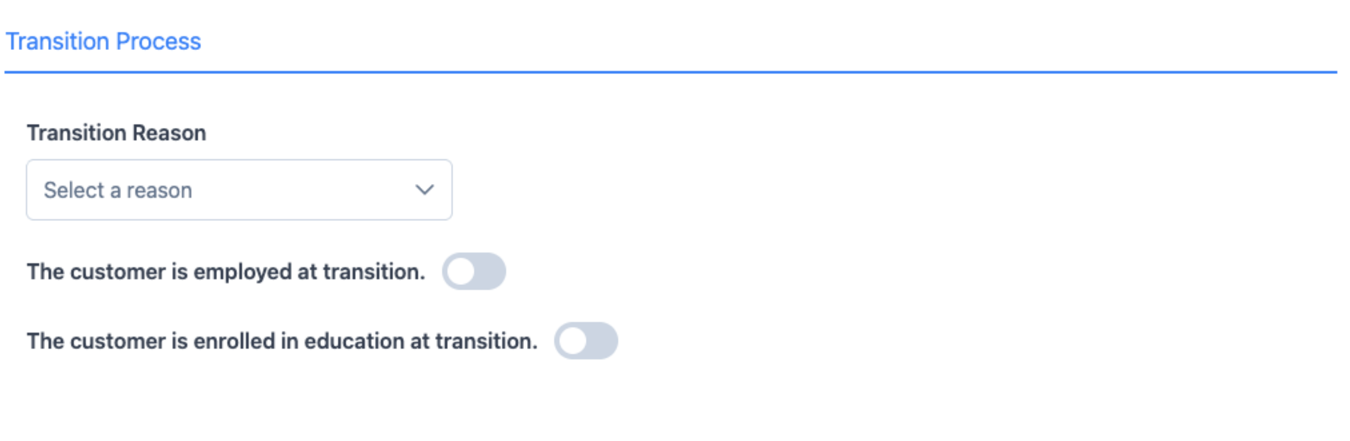


The General Transition Information page shows the LWIA, the Office, the Carre Planner Assigned, the Last Communication Date, Last Service End Date, Last Service Received, Days Remaining Until Exit, and 90 Days After Last Service. This area is a view only area.

3. The second (middle) section of the Transition page displays the Career Planning Checklist. This is an area to check up on Credentials, Measurable Skill Gains, Employment, Education Enrollments and Goals & Objectives. The Career Planner can follow the quick links to those respective areas and update them if needed. The checkboxes allow the Career Planner to track the completion of the outcome sections during the transition time period.



4. The final area is the Transition Process area. This section captures the Transition reason, customer employment at transition and/or customer education enrollment at transition.


Transition Process
Transition Reason
Select a reason
The customer is employed at transition.
The customer is enrolled in education at transition.

Follow-Up Exit Summary

The exit status at the time of exit and for four (4) quarters after exit is captured in the Exit Status Summary Page.

5. Select the Exit Summary Tab. The following page will display.


Transition | Exit Summary | Occurrence or Activity

Exit Status

Exit Date
Jun 3, 2025

Transition Reason
N/A

Education at Exit
N/A

Employment
Employer: N/A
Title: N/A
Start Date: N/A
End Date:

Education Enrollment
Provider: N/A
Program N/A
Start Date: N/A
End Date:
Status: N/A

First Quarter After Exit Status

Period
Jul 1, 2025 - Sep 30, 2025

Wages
N/A

Employment
Employer: N/A
Title: N/A
Start Date: N/A
End Date:

Education Enrollment
Provider: N/A
Program N/A
Start Date: N/A
End Date:
Status: N/A

Second Quarter After Exit Status

Period
Oct 1, 2025 - Dec 31, 2025

Wages
N/A

Employment
Employer: N/A
Title: N/A
Start Date: N/A
End Date:

Education Enrollment
Provider: N/A
Program N/A
Start Date: N/A
End Date:
Status: N/A

Third Quarter After Exit Status

Period
Jan 1, 2026 - Mar 31, 2026

Wages
N/A

Employment
Employer: N/A
Title: N/A
Start Date: N/A
End Date:

Education Enrollment
Provider: N/A
Program N/A
Start Date: N/A
End Date:
Status: N/A

Fourth Quarter After Exit Status

Period
Apr 1, 2026 - Jun 30, 2026

Wages
N/A

Employment
Employer: N/A
Title: N/A
Start Date: N/A
End Date:

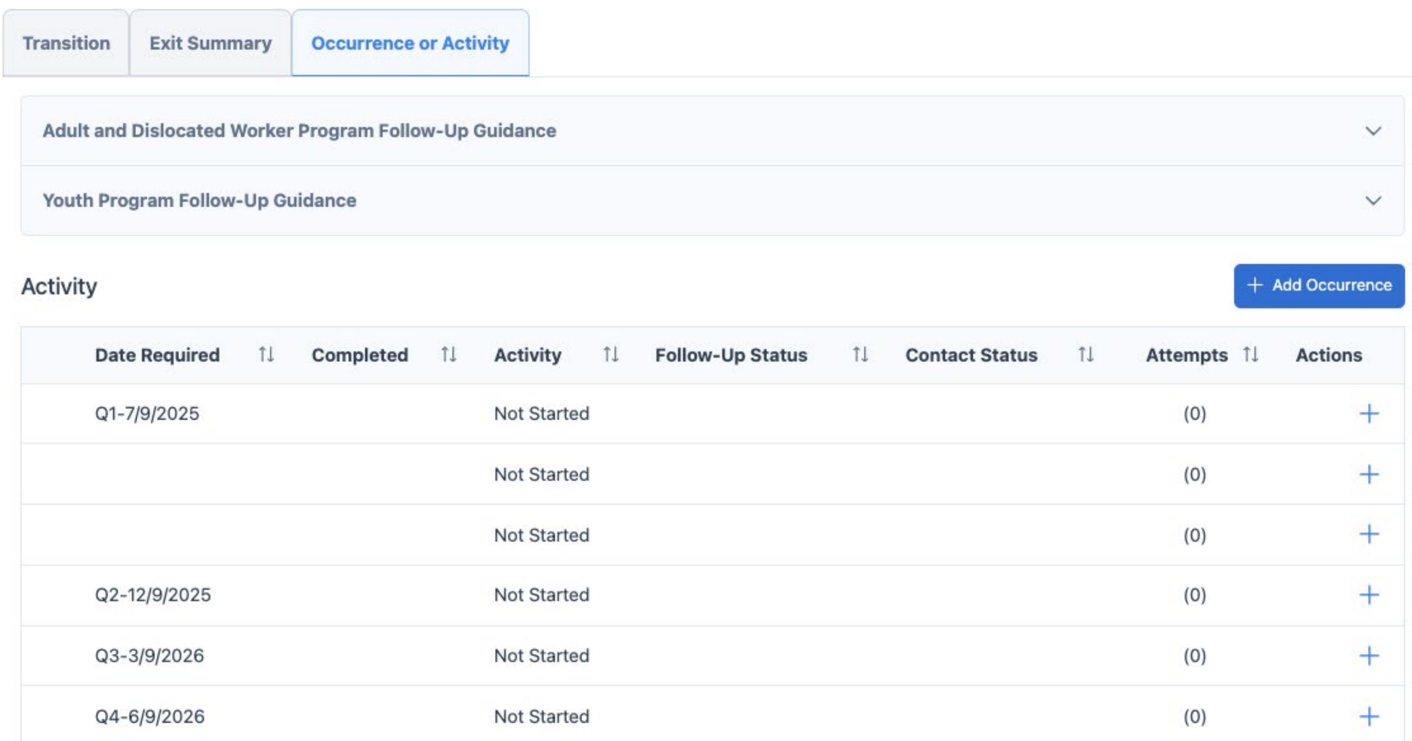
Education Enrollment
Provider: N/A
Program N/A
Start Date: N/A
End Date:
Status: N/A

There five (5) sections on the Exit Summary page. The first section shows the status at Exit. The second through Fifth sections show the status for the First – Fourth quarters after exit. These sections show Employment and/or Education Enrollments and wage matches.

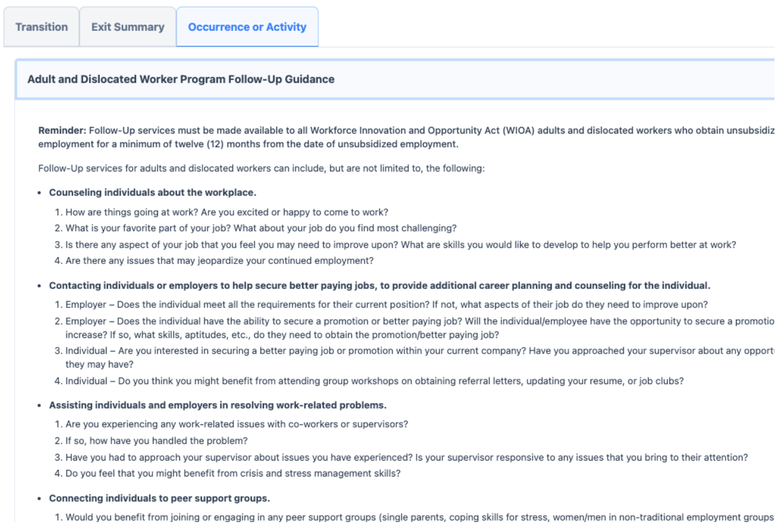
Occurrence or Activity Page Layout

The Occurrence or Activity tab page is setup for the career planner to actively track communication and follow-up services for an exited or exiting customer.

The page is laid out with two expansion areas with follow-up activity guidance. The page will look like the image here when no Follow-Up Activity has been added.

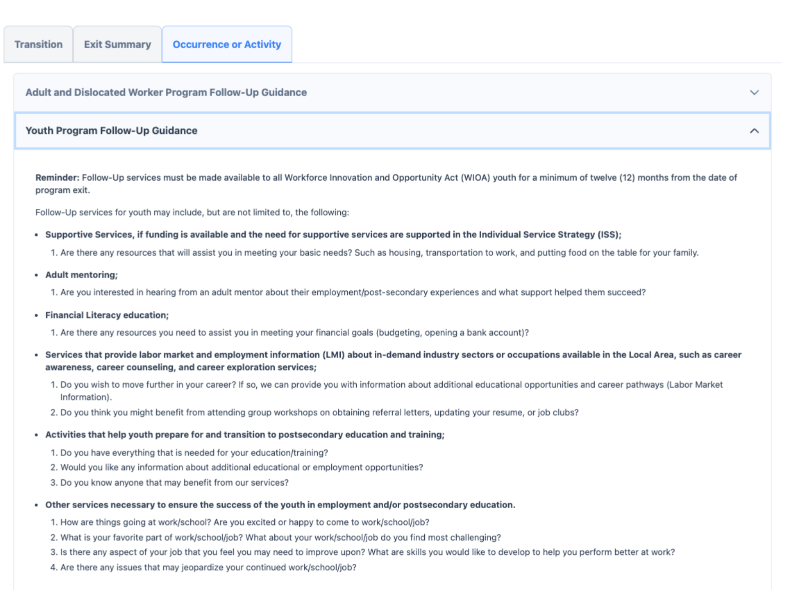


Select the first expansion area labeled Adult and Dislocated Worker Program Follow-Up Guidance. The expanded area will display as below.

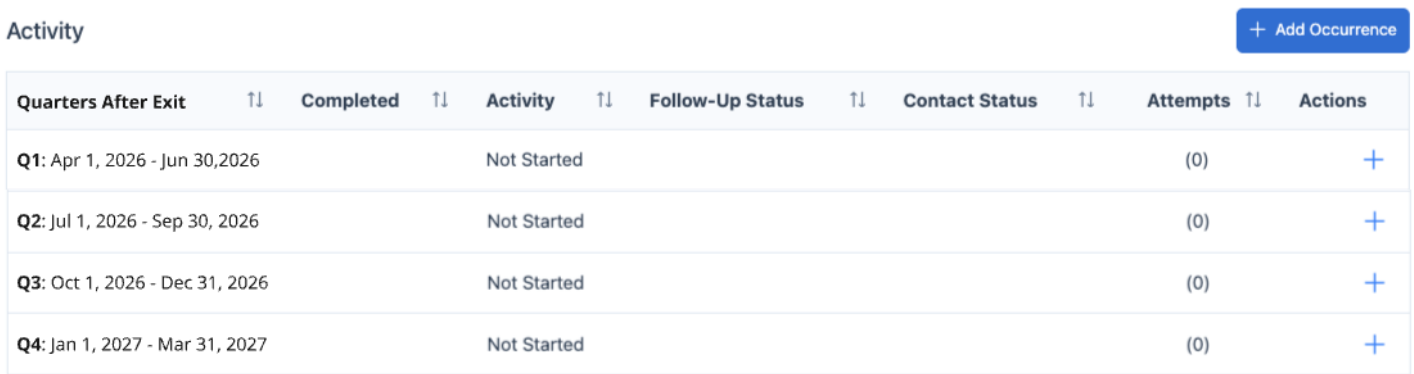


Select the expansion area again and the area will collapse.

Select the Youth Guidance expansion area and the page will look like the image below.



Below the expansion guidance areas is the Activity Grid. The activity grid starts out with 4 entries, one for each quarter with the first row for the first quarter after exit.

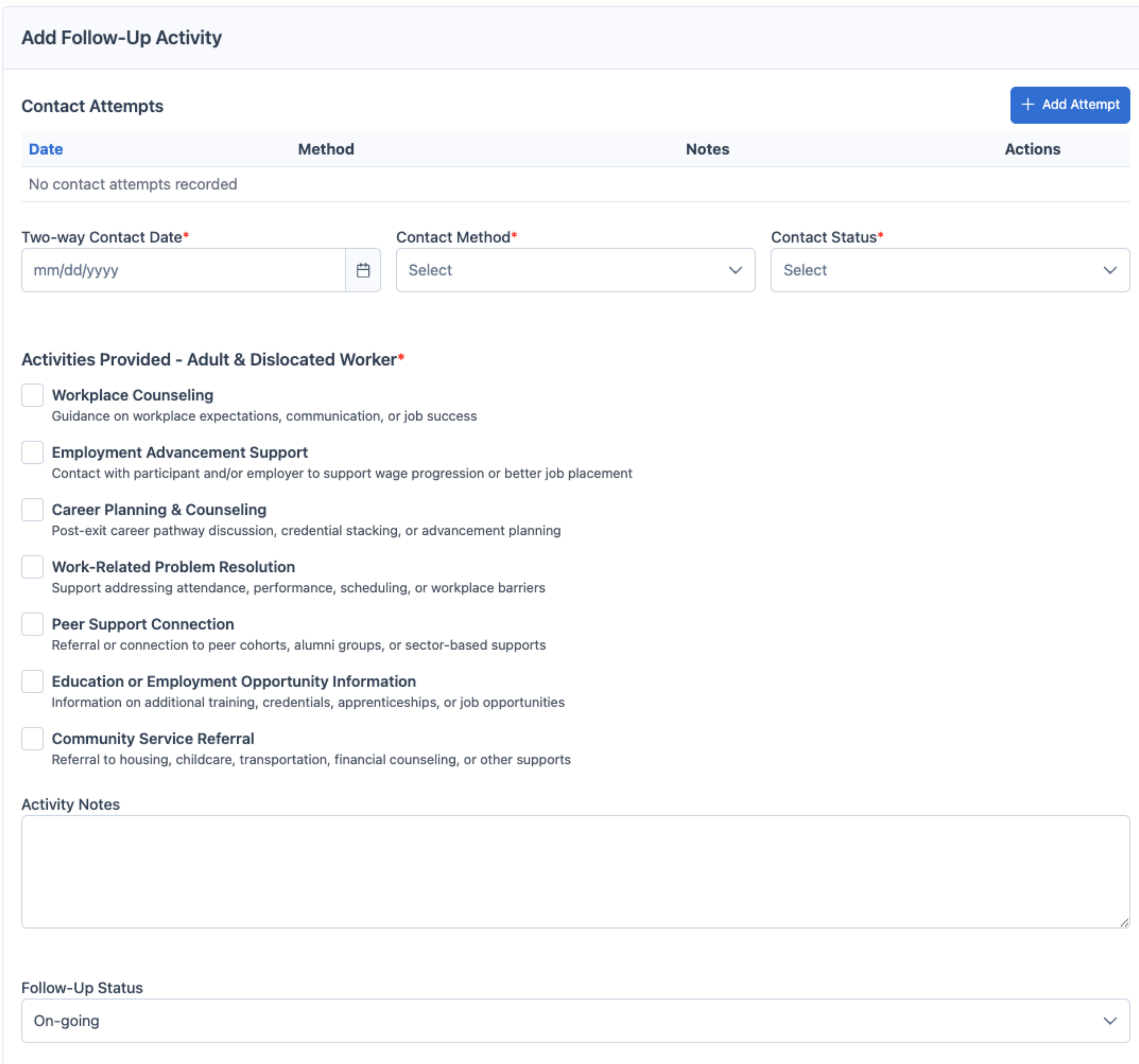


Elements in Grid

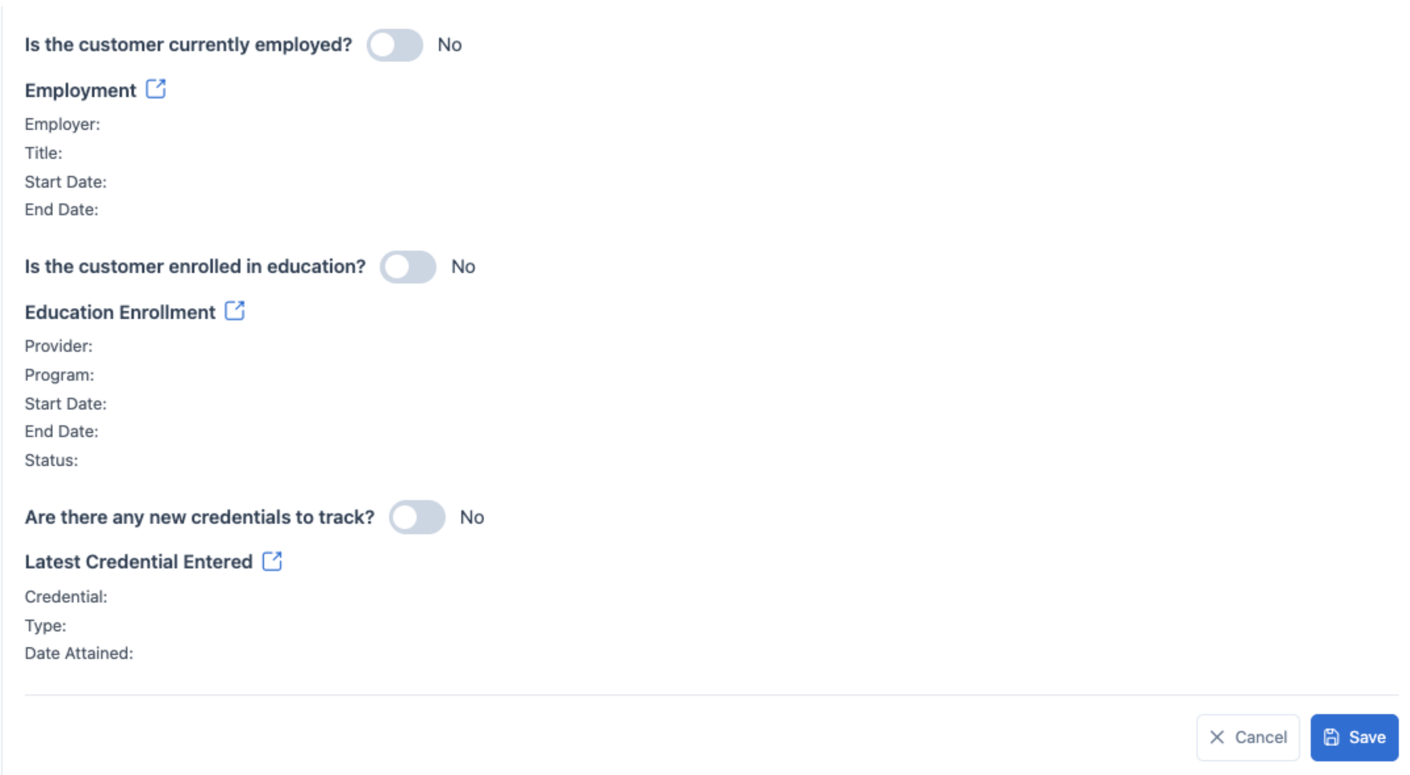
Element	Purpose	Action
[+ Add Occurrence] button	Adds an additional occurrence row	Opens new modal to add occurrence
Quarters After Exit column	Generated four (4) quarters after exit date ranges.	Sorts Ascending/Descending
Completed column	Date follow-up activities are completed for that period or row entry	Sorts Ascending/Descending
Activity column	What activity was provided	Sorts Ascending/Descending
Follow-up Status	The follow-up status (Pending / Complete)	Sorts Ascending/Descending
Contact Status column	The status of the last contact attempt for this activity set	Sorts Ascending/Descending
Attempts column	The number of contact attempts made before completion	Sorts Ascending/Descending
Actions (+/ view)	Before actions are saved this is a plus. Once saved, a view icon to open for viewing.	Open Add / View Modal

Add Activity

There are two ways to add a follow-up activity. Selecting the plus icon on a pre-filled row will open the Add Follow-Up Activity page. The second method is by selecting the **[+ Add Occurrence]** button. When either of these two (2) methods are used, the following page will open.



Continued on next page



The Add Follow-up Activity page has the following elements and usage.

- Contact Attempts Grid – A grid showing each recorded contact attempt prior to completing the activity. The grid has four (4) columns; Date, Method, Notes, Action.
    - Date – Field to display when the contact attempt was made
    - Method – What method was used to contact the customer
    - Notes – Any notes recorded by the career planner
    - Action – Edit Icon to change an attempt
- Two-way Contact Date – Date when a career planner actually spoke or successfully emailed with the customer
- Contact Method – Method the two-way contact was made (Email, In Person, Phone, Social Media)
- Contact Status – Pending or Complete
- Completion Date – Shows when the status is set to Complete
- Activities Provided – A list of checkboxes and follow-up activities that were provided to the customer. There will be lists according to the enrolled program(s); Adult, Dislocated Worker, Youth
- Activity Notes – Notes provided about the activity.

- Follow-up Status – Status for the entire follow-up period (On-Going, Not Responsive, Cannot be Located, Refuses to Provide Information
- Is the Customer Currently Employed? – Yes / No toggle with the latest employment information and link to update if needed.
- Is the Customer Enrolled in Education? – Yes / No toggle with the latest education information and link to update if needed.
- Are there any new Credentials to Track? – Yes / No toggle with the latest credential information and link to update if needed.
- Save button – Saves the changes made to the form and returns changes to the Activity Grid
- Cancel button – Ignores all changes since last save and returns the user to the Activity Grid